



**MARK-TO-MARKET (M2M)
RELEASE 7.2
ONLINE SYSTEM
OAHP USERS GUIDE**

for the

U.S. Department of Housing and Urban Development (HUD)
Office of Affordable Housing Preservation
(OAHP)



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**Mark-to-Market (M2M)
RELEASE 7.2
Online System
OAHP Users Guide
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1 M2M SYSTEM RELEASE 7.2 INTRODUCTION

Mark-to-Market (M2M) RELEASE 7.2 is a secured online HUD web application developed by the Department of Housing and Urban Development's (HUD) Office of Affordable Housing Preservation (OAHP) to support OAHP and its Participating Administrative Entities (PAEs) in the collection and tracking of data relative to expiring Section 8 contracts within the Mark-to-Market Program.

1.1 M2M Program Goals and Objectives

M2M RELEASE 7.2 introduces modifications to the existing system modules and properties going through the M2M Program processes by facilitating data collection and report generation of the following:

- ◆ Assigned assets to PAEs
- ◆ Critical dates tracking for M2M processes assigned to PAEs
- ◆ Deal restructure plan forms submission and closing data
- ◆ Reporting for PAE management
- ◆ Monitoring and auditing tools for OAHP
- ◆ Other information relevant to the M2M Program
- ◆ Accommodate the progressive requirements of the M2M Program administrators

1.2 Business Functions

RELEASE 7.2 is designed to support M2M Program objectives by performing and centralizing the following functions:

- ◆ Assignment of eligible Section 8 property contracts to PAEs for the various renewal processes
- ◆ Tracking of assigned properties through the process or "pipeline" (tracking properties, assessment, due diligence, dates, etc.)
- ◆ Providing PAEs an online system to submit restructuring plan forms to OAHP; and support OAHP and its business partners in documenting and reporting on M2M Properties
- ◆ Reporting on the progress and performance of PAEs and their assigned properties. Provide OAHP with a representation of currently assigned properties and assist PAEs in the management of their assigned portfolios.

Users of the M2M system include OAHP (Headquarters (HQ) and Preservation Office levels); OAHP's PAEs, with whom OAHP has executed agreements; and OAHP's support contractors.

1.3 System Requirements

RELEASE 7.2 uses browser-based technology to provide access via the World Wide Web. To access the system, a user must have access to the Internet using an Internet Service Provider (ISP) and advanced browser software. Netscape Navigator 3.x browser software or higher, or Internet Explorer 5.0 or higher is recommended.

As M2M RELEASE 7.2 is a secure, web-based system that contains sensitive information, security registration is required prior to gaining access. OAHP staff must fill out a security form and forward it to ADP Security for approval and registration. Further information on the M2M system's security may be found in **Section 2, M2M System Security**.

The following hardware and software is required to access and operate M2M RELEASE 7.2:

- ◆ Windows 2000 or XP
- ◆ Internet Explorer 7.0 or higher
- ◆ 486 processor or higher
- ◆ 16 megabyte memory or higher
- ◆ Hard Drive: 60MB Recommended;
- ◆ Video/Screen Resolution of 480x640 with 16 colors Display: SVGA;
- ◆ Internet Service Provider (ISP) connection with minimum modem speed of 28.8K bps (bits per second)

It is also expected that users of the M2M system have a basic understanding and proficiency in the use of computers, Windows, and web browsers.

OAHP staff may access the M2M System via either the **Intranet** (<http://hudapps.hud.gov/ssmaster>) or the **Internet** (https://hudapps.hud.gov/HUD_Systems/)

1.4 Tips for Using the System (Before Getting Started)

Functions that are standard throughout the M2M system are explained in more detail in the following subsections.

1.4.1 Case-Sensitivity Sign-On

When signing onto the M2M system, it is necessary to note that user names and passwords are case-sensitive (i.e., whatever uppercase/lowercase convention is used to create User IDs and passwords, must be used to sign into the system).

1.4.2 Set Browser to Accept “Cookies”

Users must ensure that their browsers are set to “Accept All Cookies.” The following paragraphs provide instructions for Internet Explorer users to set this feature:

Internet Explorer 7.0 users: select “View” on the top tool bar; select “Internet Options”, select “Advanced”, scroll down below “Security” to “Cookies” and ensure “Always Accept Cookies” is checked.

For all other browsers, go through the “Help” section to ensure the browser is set to accept all cookies.

1.4.3 Saving Changes

After adding or updating data on any screen, follow the directions on that screen to retain any changes made before proceeding to another screen. In browser-based applications, data will be lost when navigating to other pages if not saved.

1.4.4 Date Format

All dates must be entered in the MM/DD/YYYY format.

1.4.5 Error Messages

If an error message is encountered anywhere in the M2M system when navigating from one screen to the next, follow the instructions presented in the resulting informational screen. If that does not resolve the problem, click the “Reload” button on Netscape’s toolbar to reload the page (as shown below in Figure 1-1, Netscape Reload Button), or review the information last entered on the screen for accuracy.

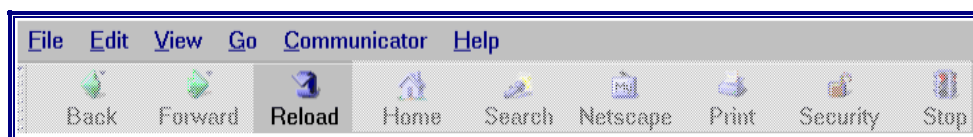


Figure 1-1, Netscape Reload Button

If further technical assistance is needed, return to the Home screen and send an e-mail message through the link (located on the M2M home screen). Describe the question or problem in detail, and include a reply e-mail address (if different than the sender's), and name and telephone number of the contact person. A reply will be sent promptly.

2 M2M SYSTEM SECURITY

M2M is part of HUD's Secure Systems. Access to the system will be granted at the user level, restricted to selected OAHP HQ, Preservation Offices, HUD Intranet Guests, and PAE;s using the Internet that are acting as agents for OAHP. The M2M database contains confidential information on HUD's portfolios and program participants. To perform processing functions in the M2M system, a user must have a valid User ID and password with the necessary roles and security access. The HUD Intranet Guest user will have view-only access to the system (i.e., they will not be able to make any updates to M2M data).

2.1 M2M Security Roles and Access Levels

The M2M system has four designated Secured System groups:

1. OAHP HQ
2. Preservation Office
3. Guest
4. PAE

The OAHP HQ and Preservation Office level users have a group property assignment function that associates them to all PAEs and properties referred to the M2M system.

The Preservation Offices have more restricted access to the M2M system than the OAHP HQ user.

The Guest user has a "view only" access of the properties and the PAEs currently in the M2M system.

The PAE level has specific user property assignments for access to the system, the PAE user will be restricted to viewing and updating the properties to which they have been specifically assigned.

The M2M system reads the user's property assignments and their secured system group to provide additional security in the M2M system.

There are different levels of user access defined for the M2M system based on the user's group affiliation and property assignment is what they have access to view, make data entries or update information in the M2M system. There is an **M2M Administrator** responsible for the access permissions for the OAHP (HUD) user ids and the coordination of the PAE registration for user and coordinator ids and their permission levels.

OAHP users must fill out a form to obtain a HUD user id, then gain approval for a user id and M2M access from their supervisor and the M2M system administrator. ADP Security assigns a unique user id to all HUD staff requesting.

For PAEs, there are two roles: **Coordinator** and **User**.

For OAHP, there are two roles: **HQ** and **Preservation Office** roles.

PAE coordinators are responsible for permission levels for the users registered under their Tax ID for the M2M system access. Property assignment maintenance is the primary responsibility of the PAE Coordinator.

OAHP HQ has asset allocation rights, approval rights, and other data entry responsibilities

OAHP Preservation Office users have similar rights as the OAHP HQ users. The primary difference is the edit rights are restricted to HQ only.

The six M2M OAHP Preservation Offices (**San Francisco**; **New York**; **Chicago**; **Washington, DC**; **OAHP Transaction Center**; and **Centralized Closing**) have OAHP HQ as their system administrator for the M2M program. The Preservation Offices will be responsible to notify OAHP HQ of any changes in staff working on the M2M program in order to manage the access to the M2M system.

3 ACCESS TO THE M2M LOGIN SCREEN

The M2M home screen may be accessed by authorized system users through HUD's Intranet. Users must have a Secure System user ID and password. **Reminder: both the user ID and password are case-sensitive.**

3.1 Login Procedures


OAHP staff may access the M2M system through HUD's Intranet home Screen in Secure Systems or via the Internet. Access through the **Intranet** is by typing the following Intranet address: <http://hudapps.hud.gov/ssmaster>.

Each User is prompted with a request for their User ID and password. **Reminder: both the User ID and password are case-sensitive.** Click the underlined **Mark-to-Market (M2M)** link on the list of HUD System Projects.

Any User that is unsuccessful in signing onto the system after several attempts may need to have its password reset. Send a password reset request to the **System Administrator** via e-mail at: m2minfo@hud.gov. **This is not an immediate process, but will be addressed as soon as possible.** Remember to include

contact information (name, User ID, e-mail address (if different than sender's) and a brief explanation of the problem).

3.2 Log Off Procedure

Because M2M RELEASE 7.2 contains sensitive financial data, Users are requested to use the Log Off button  feature when exiting the system or when leaving your computer running for an extended period of time. If the log off button is **not** used, another User may be able to reopen your web browser and access system pages.

3.3 Time Out Feature

M2M RELEASE 7.2 has a “time-out” feature. After a period of **2 hours** of inactivity, the User will be logged off the system and must go back to the **Secure Systems** log-in page to sign-in again.

4 M2M SYSTEM HOME SCREEN

Upon authentication from the server, the following home screen appears (Figure 4-1, M2M Home Screen):



Figure 4-1, M2M Home Screen

4.1 Asset Allocation Module Button

The **Asset Allocation** button provides access for an OAHP HQ user to add or update PAEs to the M2M system, after which, the PAE may be assigned properties by a HQ user.

4.2 Critical Dates Tracking Module Button

The **Critical Dates Tracking** button provides access to the M2M properties. Within this module, OAHP Users enter critical dates data in accordance with the predetermined M2M Program timeline for **Mortgage Restructuring**, **Rent Reduction Only without Mortgage Restructuring (Rent Reduction Only)**, and **Rent Comparability Review (Comp Review)** properties.

4.3 Restructuring Plans Module Button

The **Restructuring Plans** button provides Users with access to restructuring plan forms for assigned M2M properties. Online forms are for PAEs with properties going through the **Mortgage Restructuring** (Form 5.2, Part II.B Case Memorandum Term Sheet) and the **Rent Reduction Only** (Form 10.2 OAHP Reduction of Rent and Section 8 Contract Renewal Justification) renewal options and must be submitted by the PAEs via the M2M system to OAHP.

4.4 Closing Module Button

The **Closing** button gives Users a facility for tracking and updating select restructuring plan information and to retain the actual closing figures.

4.5 Reports Module Button

The **Reports** button gives Users access to the reports in the system.

4.6 Green Retrofit Button

The **Green Retrofit** button facilitates users in retrieving properties assigned to them under the Green Retrofit portfolio and in entering critical date information relative to the retrofit process.

4.7 E-Mail Link

The M2M system provides an **E-Mail** link on the home screen for Users of the system to send any questions or comments regarding the M2M system and problems or suggestions by clicking the **E-Mail** link to open the User Feedback popup screen (Figure 4-2, User Feedback Screen). Please be sure to include your name, a detailed narrative (if sending a question or if there is a problem), return e-mail address (if different from the sending address), contact name, and telephone number (including area code) to receive a timely reply. Please click the Send Email button to send your e-mail message.

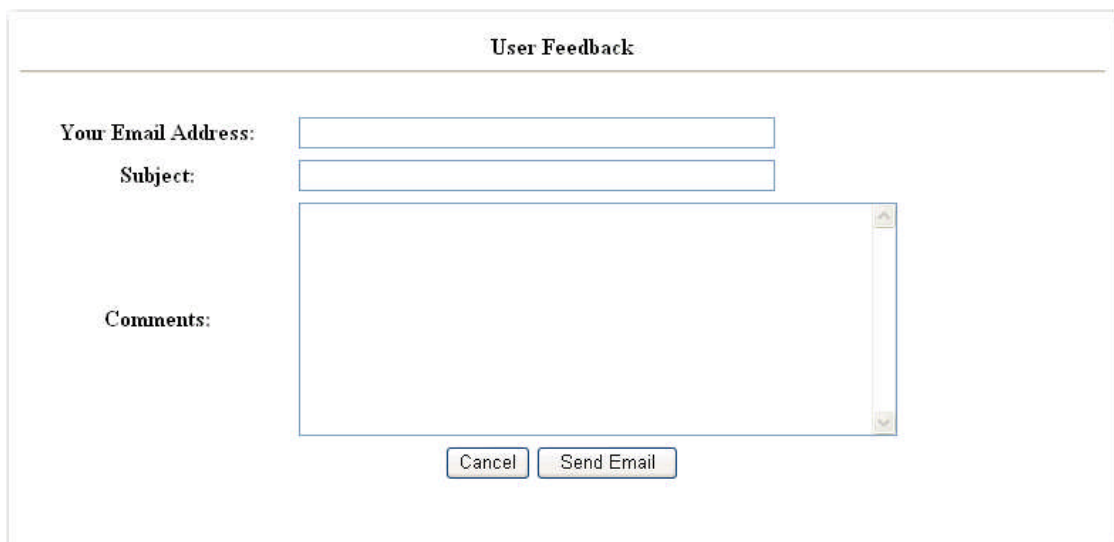
The image shows a web-based form titled "User Feedback". It contains three input fields: "Your Email Address:" with a single-line text box, "Subject:" with a single-line text box, and "Comments:" with a larger multi-line text box. At the bottom of the form are two buttons: "Cancel" and "Send Email".

Figure 4-2, User Feedback Screen

♪ **Note:** Click the Close button on the Successful Screen to return to the M2M system after sending your e-mail message.

4.8 Other HUDweb sites

Other useful HUDweb sites (such as HUD's home screen) are listed at the bottom of the screen. Click on an underlined link to visit a HUD web site.

♪ **Note:** You will be exiting the M2M system if you click one of the external HUD links. Use Your Browser's Back button on the toolbar to return to the M2M system.

5 GENERAL INFORMATION ABOUT THE M2M PROCESS AND DATA ENTRY

M2M RELEASE 7.2 allows Users to input and record dates critical to the M2M Program process, to input and submit restructuring plan forms data, and to perform other functions pertinent to the M2M Program. Property and management reports summarize the status and progress for M2M Program properties in order to assist in the management of assigned portfolios.

A data entry screen is included within the **Critical Dates Tracking** module to record critical dates for each property in the M2M system. Each of these data entry screens were designed to reflect the actual dates within the execution of a M2M Program process. A M2M renewal option is one of four types:

1. **Mortgage Restructuring**—Renewal with mortgage restructuring
2. **Rent Reduction Only**—Renewal with rent reduction and no debt restructuring (also referred to as OAHP Life)
3. **Comp Review**—An owner declares its rents are below market and HUD's field office has requested a third party rent comparability review to determine market rents
4. **Post M2M Comp Review**—Mark-Up-To-Market Comp Review, A Comp Review performed after a Rent Reduction Only or Mortgage Restructuring has been completed

It is imperative that attention to detail be paid when entering data in the **Critical Dates Tracking** and the **Restructuring Plans** modules. Reports use this data to determine the progress and performance of the PAEs, Preservation Offices, and OAHP.

 **Note:** Inaccurate or incomplete data may misrepresent the progress (or lack thereof) of a property and associated contract throughout the M2M program.

Additional detailed information concerning the **Critical Dates Tracking** and **Restructuring Plans** modules may be found in **Section 7, Critical Dates Tracking Module** and in **Section 8, Restructuring Plans Module**, respectively.

6 ASSET ALLOCATION MODULE

The Asset Allocation module is accessible to OAHP and Guest Account users by selecting the **Asset Allocation** button on M2M's home screen. OAHP RO and Guest Account users will see a limited set of the functions as view only.

6.1 Asset Allocation Screen

The following screen (Figure 6-1, Asset Allocation Screen) will be returned when the Asset Allocation module button is clicked:



Figure 6-1, Asset Allocation Screen

The **Asset Allocation** screen allows access to the following functions:

- ◆ Add New PAEs
- ◆ View Existing PAEs and Assigned Portfolios
- ◆ Retrieve New Contracts from REMS
- ◆ Retrieve Contracts Referred to OAHP, but not through REMS
- ◆ Retrieve Mod/rehab Properties
- ◆ Review Assets Referred to OAHP via REMS, but not yet received
- ◆ Review Assets Received at OAHP waiting PAE Assignment
- ◆ Review M2M Assets Potentially Eligible for Mark-Up-To-Market But Not Yet Received

- ◆ Review M2M Assets Requesting Mark-Up-To-Market Received at OAHP waiting PAE Assignment
- ◆ Assigned Properties Pending C.O.I. Approval and/or Referral Receipt
- ◆ Assign/Update Portfolio Manager
- ◆ Update Rehab Escrow Account Closed Date
- ◆ Change Preservation Office
- ◆ Ineligible Properties

The buttons appear in this order to logically instruct the user to complete the addition of a PAE (if not previously added to the M2M system) before attempting to assign properties.

The left side of this page provides access to the Critical Dates Tracking, Restructuring Plans, Closing, and Reports modules by clicking the respective buttons.

6.2 Add New PAEs Screen

This is the first step in adding new PAEs into M2M. When the **Add New PAEs** button is clicked, the screen below (Figure 6-2, Select a New PAE Screen), will appear:

The screenshot shows the 'Select A New PAE' screen. The left sidebar contains the M2M logo, the date 'September 14, 2001', and four buttons: 'Critical Dates Tracking', 'Restructuring Plans', 'Closing', and 'Reports'. Below these is a link to 'Click on the mailbox to E-mail your comments and suggestions.' and a 'User ID: C13259' label. The main content area has a title 'Select A New PAE' and instructions: 'To add a PAE to the Mark-to-Market system, enter the **Tax Identification Number** of the PAE below.' There is a text input field for 'PAE TIN #' with 'Continue' and 'Clear' buttons. At the bottom, there are links for 'HUDweb Housing', 'HUDweb Help', 'HUDweb Search', 'HUDweb Home', and 'Privacy'.

Figure 6-2, Select a New PAE Screen

The OAHP HQ user must have the **Tax ID Number (TIN)** of each PAE that will be added. The M2M administrator notifies the REMS' administrator of new PAEs

and their Tax ID numbers. The PAE and its TIN must exist in the REMS' Participant table **before** the PAE can be added to the M2M system. If an error message is returned, please recheck the TIN entered and, if necessary, contact the OAHP security administrator. Do not use a dash when entering a TIN.

When a valid REMS PAE TIN is entered, the following **Add a PAE** screen will appear (shown on the next page as Figure 6-3, Add a PAE Screen). Where applicable, existing data from the REMS system is used to populate fields. Some fields will appear blank if the information is not found in REMS. The OAHP HQ user is encouraged to complete, update and correct the M2M PAE data, whenever possible. The data used in the M2M system is what will be retained for M2M reporting and later submitted back to HUD.

Home Back Secure Systems Log Off

View/Update PAE Details

To view this PAE's assigned properties, click [Assigned Properties](#).

PAE Name: ATLANTIC CITY HOUSING AUTHORITY

Address: 227 N VERMONT AVE
P.O. BOX 1258

City: ATLANTIC CITY,

State: NEW JERSEY

Zip: 08404 - 0000

PAE Type: Public required

HFA Type: Local

Jurisdiction: NJ

Contact 1 Name:

Contact 1 Phone:

Contact 1 E-mail:

Contact 2 Name:

Contact 2 Phone:

Contact 2 E-mail:

Telephone: (609) 344-1108

Fax:

Director:

Project Manager:

Proj. Mgr. Email:

PAE Start Date: mm/dd/yyyy

Assigned Preservation Offices: New York

PAE Active Status: Active

Cap: 25

Current Active Property Assignment: 0

Cumulative Property Assignment Number: 0

Comment Box: C

GRP PAE:

Save Changes

Figure 6-3, Add a PAE Screen

After entering or updating PAE-related data, click the **Save Changes** button to save entered data.

6.2.1 Data Entry

The PAE Name field should have been automatically filled in. **Do not** change the spelling of the PAE Name.

It is mandatory that a value be chosen for the **PAE Type** field when adding a new PAE to the M2M system. The user must indicate by selecting from a drop-down box whether the entity is a **Public** or **Non-Public** PAE. If no value is chosen when an attempt is made to save data, an error message will be displayed.

6.2.2 Successful Record Addition

M2M displays a confirmation message after a new PAE is successfully added to the system. After a PAE has been added into the M2M system, it is now available to receive property assignments by OAHP HQ.

Clicking the [View Existing PAEs](#) link will take the user to the PAEs screen, where all of the PAEs in the system may be viewed and/or updated. The PAEs screen is further explained in **Section 6.3, View/Update PAEs Screen**.

6.3 View/Update PAEs Screen

After a PAE has been entered into the M2M system, the OAHP HQ user may view or update PAE-related data, as necessary.

When the [View/Update PAEs](#) button is selected, the following screen (Figure 6-4, PAEs Screen) will appear:

Home
Back
Log Off

PAEs

To **View/Update** PAE Details, click an underlined PAE name.

PAE Name	PAE Type (Public/ Non-Public)	Jurisdiction	PAE Status (Active/ Inactive)	Cumulative Property Assignment	Active				Cap	Assigned Regional Offices
					Total	Full	Lite	Comp		
CHAMCO HOUSING CORPORATION	N	Test jurisdiction	A	4	4	2	1	1	3	Washington
COLORADO HOUSING FINANCE AUTHORITY	P	west	A	1	1	1	0	0	20	San Francisco
D.C. HOUSING FINANCE AGENCY	P	Testing	A	0	0	0	0	0	10	Washington
FLINT LAFAYETTE LIMITED PARTNERSHIP	P		A	0	0	0	0	0	0	New York
Florida Housing Finance Corporation	N	Southeastern	A	26	19	11	4	4	500	Washington
INTERFAITH HOUSING ENTERPRISES, L.P.	N		A	4	4	1	3	0	0	Washington
Jefferson County Assisted Housing Corporation	N	Southern US	A	57	52	25	16	11	50	Washington
MASSACHUSETTS HOUSING FINANCE AGENCY	P	Northeast	A	9	8	4	3	1	0	New York
OHFA	P		A	0	0	0	0	0	0	
OHIO HOUSING FINANCE AGENCY	N	Midwest	A	16	14	10	1	3	100	Chicago
OMHAR Transaction Center PAE	N		A	1	1	0	1	0	0	
PENNSYLVANIA HOUSING FINANCE AGENCY	P	Testing	A	32	30	17	7	6	100	
Tennessee Housing Development Agency	P	Southeast	A	0	0	0	0	0	50	Washington
WEST VIRGINIA HOUSING DEVELOPMENT FUND	N	Wash.	A	22	20	13	7	0	15	Washington

[Asset Allocation](#)

| [HUDweb Housing](#) | [HUDweb Help](#) | [HUDweb Search](#) | [HUDweb Home](#) | [Privacy](#) |

Figure 6-4, PAEs Screen

This screen is a summary of the PAEs (in alphabetical order) currently entered in the M2M system. Assignment values on this screen are system-generated. Other PAE information is entered by the OAHP HQ user either through the **PAE View/Update PAE Details** screen or the **Add PAE** screen.

6.3.1 View/Update PAE Data

To view or update a PAE's existing data, click its underlined link and the following View/Update PAE Details screen will be returned, Figure 6-5, View/Update PAE Details Screen:

[Home](#)
[Back](#)
[Secure Systems](#)
[Log Off](#)

View/Update PAE Details

To view this PAE's assigned properties, click [Assigned Properties](#).

PAE Name:

Address:

City:

State:

Zip: -

PAE Type: required

HFA Type:

Jurisdiction:

Contact 1 Name:

Contact 1 Phone:

Contact 1 E-mail:

Contact 2 Name:

Contact 2 Phone:

Contact 2 E-mail:

Telephone:

Fax:

Director:

Project Manager:

Proj. Mgr. Email:

PAE Start Date:

Assigned Preservation Offices:

PAE Active Status:

Cap:

Current Active Property Assignment: 0

Cumulative Property Assignment Number: 6

Comment Box:

GRP PAE:

[Save Changes](#)

Assigned Properties

To view/update a contract's critical dates, click its underlined contract number.

Property ID	Contract Status	Property Name	Contract Number	Contract Renewal Type	Expiration Date	Property City	Property State	Unassign Property
800006555	C	BALSAM ON THE FALL CREEK	IN36E000006	Full	03/27/2003	INDIANAPOLIS	INDIANA	<input type="button" value="C"/>
800006567	C	BOLTON COURT APARTMENTS	IN360061015	Full	10/31/2006	INDIANAPOLIS	INDIANA	<input type="button" value="C"/>
800006613	C	CARAVELLE COMMONS APARTMENTS	IN36M000231	Full	09/30/2009	INDIANAPOLIS	INDIANA	<input type="button" value="C"/>
800006932	C	PARKWOOD APARTMENTS I	IN360060021	Full	12/31/2004	INDIANAPOLIS	INDIANA	<input type="button" value="C"/>
800006933	C	PARKWOOD APARTMENTS II	IN360061014	Full	12/31/2004	INDIANAPOLIS	INDIANA	<input type="button" value="C"/>
800007087	C	WEYERBACHER TERRACE APARTMENTS	IN36L000013	Full	08/31/2004	INDIANAPOLIS	INDIANA	<input type="button" value="C"/>

[Save Changes](#)

Figure 6-5, View/Update PAE Details Screen

This screen closely resembles the [Add New PAE](#) screen. Its purpose is to allow the OAHP HQ user the ability to update or add PAE data, as necessary. For example, if inaccurate data was previously entered or if the contact name has changed, it may be corrected or updated on this screen.

6.3.2 Assigned Properties Section

At the bottom of the View/Update PAEs screen, all of the current properties assigned to the PAE are listed in the **Assigned Properties** section. Clicking an underlined **contract number** link will take the user directly to the Critical Dates Tracking data entry screen for that property. No properties will appear unless they have been assigned (refer to **Section 6.8.3, Review Asset Received at OAHP waiting PAE Assignment**). This module is further discussed in detail in **Section 7, Critical Dates Tracking Module**. A Comment field is also available for each property.

6.3.3 Unassign Property

OAHP HQ users may unassign a property from a PAE by putting a check mark (☒) in the **Unassigned Property** box next to each property that is to be unassigned. Once the **Save Changes** button is clicked, each property will then be available for reassignment to another PAE in the Review/Assign Assets module. This action will reduce the PAE's **Current Active Property Assignment** and the **Cumulative Property Assignment Number** counts by one for each property unassigned as well as create a history record of the action. The 'OAHP Receives Referral from Field Office' date is retained in the current critical dates to allow reassignment of the property.

6.4 Retrieve New Contracts from REMS Screen

It is important to note, that since M2M RELEASE 7.2 is a web-based system, users of the system may be required to reload pages or manually retrieve data in order to have current information.

At least once a day, an OAHP HQ user should retrieve new Section 8 contracts that qualify for the M2M Program from the REMS database by clicking the **Retrieve New Contracts from REMS** link (located on the **Asset Allocation** page). It may take several minutes for this process to complete. After the process has completed, a confirmation screen will appear.

From the **Retrieve New Contracts** confirmation screen, the OAHP HQ user may select the **Review Assets** button to continue. The **Review Assets Referred to OAHP via REMS, but not yet received** link (located on the **Asset Allocation** screen) will also take the User to the selection criteria for the Review Assets Referred to OAHP via REMS, but not yet received section (as illustrated in Figure 6-6, Select Search Criteria below). This facilitates a focused search of properties once contracts referred to OAHP have been retrieved.

Note: To ensure that M2M-related properties are available for assignment on a timely basis, the Retrieve New Contracts button should be clicked at least once a day.

The screenshot shows the M2M web application interface. On the left is a blue sidebar with the M2M logo, the date 'November 9, 2004', and a list of links: 'Critical Dates Tracking', 'Restructuring Plans', 'Closing', and 'Reports'. Below these links is a mailbox icon and the text 'Click on the mailbox to E-mail your comments and suggestions.' and 'User ID: C12329'. The main content area has a top navigation bar with 'Home', 'Back', 'Secure Systems', and 'Log Off' buttons. The title is 'Select Search Criteria for Reviewing Assets Referred to OAHP via REMS But Not Received'. Below the title, it says 'Select one of the following criteria:' followed by two input fields: 'REMS ID:' and 'FHA #:'. Then it says 'Or select one or more of the following options:' followed by a 'Property:' input field and a 'State:' dropdown menu. There are 'Continue' and 'Clear' buttons. At the bottom, it says 'Or click [HERE](#) to get ALL the properties Referred to OAHP via REMS But Not Received.' and a footer with links: 'HUDweb Housing', 'HUDweb Help', 'HUDweb Search', 'HUDweb Home', and 'Privacy'.

Figure 6-6, Select Search Criteria

Select one of the following criteria available to search for properties to be received:

- ◆ Enter a REMS ID for a specify property
- ◆ Enter a FHA Number for a specific property

Or select one or more of the following options available to search for properties to be received:

- ◆ Enter a Property's Name for a specific property
- ◆ Select a state from the drop-down list
- ◆ Click the underlined [HERE](#) link to retrieve all referred properties awaiting to be received

6.5 Retrieve Contracts Referred to OAHP, but not through REMS Screen

Clicking this link from the Asset Allocation screen will display the screen shown below, Figure 6-7, Retrieve Contract Referred to OAHP, but not through REMS. This function is for retrieving properties into M2M that have been referred to OAHP, but have not had the proper renewal option code updated in REMS. The properties may be requested by property ID number or contract number.

M2M

November 9, 2004

[Home](#) [Back](#) [Secure Systems](#) [Log Off](#)

Compile List Of Contracts Referred to OAHP, but not through REMS

Enter Up To 10 Property IDs And/Or Contract Numbers In The Boxes Below:

Enter Up To Ten Property IDs Below:

1		2	
3		4	
5		6	
7		8	
9		10	

Enter Up To Ten Contract Numbers Below:

11		12	
13		14	
15		16	
17		18	
19		20	

[Continue](#) [Clear](#)

[HUDweb Housing](#) | [HUDweb Help](#) | [HUDweb Search](#) | [HUDweb Home](#) | [Privacy](#) |

Figure 6-7, Retrieve Contract Referred to OAHP, but not through REMS

6.6 Retrieve Mod/Rehab Properties Screen

This function allows OAHP HQ users to retrieve designated Mod/Rehab properties into M2M. The property may be selected by entering the Property Number or the FHA Number. Since these properties do not have renewal contracts, the user must enter a Contract Number and Expiration Date for tracking purposes within M2M. All currently saved mod/rehab contract numbers should be in the new format according to user defined specifications(For Example: FL001MR0001). The entry screen is show below in Figure 6-8, Mod/Rehab Properties Screen.

M2M

September 17, 2001

Critical Dates Tracking

Restructuring Plans

Closing

Reports

Click on the mailbox to E-mail your comments and suggestions.

User ID: C12259

[Home](#) [Back](#) [Log Off](#)

Select A Mod/Rehab Property

To add a Mod/Rehab Property to the Mark-to-Market system, enter the **Property Number** or the **FHA Number** and the **Contract Number** and its **expiration date** below.

Property #:

OR

FHA #:

AND

Contract #:

AND

Expiration Date:

Figure 6-8, Mod/Rehab Properties Screen

6.7 Retrieve Assets Referred to OAHP via REMS, but not yet received

The **Retrieve Asset Referred to OAHP via REMS, but not yet received** function allows OAHP HQ users to review and assign receive dates to the selected properties. The search screen is described and shown in **Section 6.4 Retrieve New Contracts from REMS Screen** and **Figure 6-6, Select Search Criteria screen**. The displayed properties are active, not assigned to a PAE, and do not have a Referral Receipt Date. The following steps direct users in making Receipt assignments:

1. Click the Add check box ☐ next to the Property ID to indicate the property is have a Referral Receipt Date
2. If desired, click the Comment Box to enter any comments
3. Enter the desired Referral Receipt Date (defaulted to current date)
4. Repeat steps 1-3 for each additional property
5. You may alternately designate the property as being Ineligible by clicking the Ineligible check box and entering a comment in the Ineligible Comment Box

- After all property selections have been made, enter your first name, middle initial, and last name in the **Enter Your Name** field

Enter Your Name:

- Click the Submit button to save the Referral Receipt Dates and/or Ineligible designations for your selections

The Referral Receipt Date for a property will not be saved by M2M unless there is a check mark in the **Add** box in addition to the OAHP HQ approver's name in the **Enter Your Name** field.

Any property that is not getting a receipt date or becoming Ineligible when the screen is saved, will be available the next time the **Retrieve Asset Referred to OAHP via REMS, but not yet received** page is retrieved (depending upon the selection criteria used). Shown below in Figure 6-9, Asset Referred to OAHP via REMS, but not yet received Screen, is a sample screen of selected properties.

Home Back Secure Systems Log Off

Review Assets Referred to OAHP via REMS But Not Received

The following 3 out of 3 properties met your LA state search criteria.

- Check the Add box (☒) next to each property that you are adding a referral receipt date.
- Click the pop-up box next to each property ID to add any comments.
- Click the Submit button below to save your additions.

Add	Property Name	Property City	State	Sec & Contract Number	Referral Date	Sec & Contract Renewal Type	Referral Receipt Date	Ineligible
<input type="checkbox"/> <input type="button" value="C"/>	DESOTO ESTATES	MANFIELD	LA	LA480010004	09/24/1999	Full	<input type="text" value="11/09/2004"/>	<input type="checkbox"/> <input type="button" value="C"/>
<input type="checkbox"/> <input type="button" value="C"/>	OLDE SALEM VILLAGE	SHREVEPORT	LA	LA48L000055	09/24/1999	Full	<input type="text" value="11/09/2004"/>	<input type="checkbox"/> <input type="button" value="C"/>
<input type="checkbox"/> <input type="button" value="C"/>	RED RIVER ESTATES	COUSHATTA	LA	LA481010001	09/24/1999	Full	<input type="text" value="11/09/2004"/>	<input type="checkbox"/> <input type="button" value="C"/>

Enter Your Name: (First name, last name)

Before proceeding to another screen, save all changes by selecting the SUBMIT button.

[HUDweb Housing](#) | [HUDweb Help](#) | [HUDweb Search](#) | [HUDweb Home](#) | [Privacy](#) |

Figure 6-9, Retrieve Asset Referred to OAHP via REMS, but not yet received Screen

6.8 Review Assets Received at OAHP waiting PAE Assignment

The **Review Asset Received at OAHP waiting PAE Assignment** screen is used to review and assign properties to PAEs within the M2M system. M2M generates recommended property assignments based on predefined geographical criteria. This screen allows the OAHP HQ user the ability to:

- ◆ See the geographically recommended PAE for a property

- ◆ Choose another PAE for the property
- ◆ Review a summary of the PAE that is being considered for selection
- ◆ Review a listing of all the properties awaiting assignment in the M2M system
- ◆ Review the M2M renewal type currently entered in REMS and the option of changing it in M2M
- ◆ Utilize comment boxes to add information/comments, as needed, for each assignment
- ◆ Indicate that the property is to be Ineligible
- ◆ Indicate that the property is to be a partial assignment for a Mortgage Restructuring Plan and Rent Reduction Only.
- ◆ Selecting one of the 3 OAHP PAE (OAHP WPO – Creditvest, OAHP WPO – ONTRA, Inc., or OAHP Chicago – Heskin) shall require the property to be selected as a partial if it's a Full or Lite renewal type.

The screen is depicted below as Figure 6-10, Review/Assign Assets Screen:

Home
Back
Secure Systems
Log Off

Review / Assign Assets

The following 3 out of 3 properties met your All search criteria.

- Check the Assign box (☒) next to each property that you are assigning to a PAE. All of the contracts associated with the property will be assigned.
- Click the pop-up box next to each property ID to add any comments.
- Click the Submit button below to save your assignments.

Assign	Property Name	Property City	State	Sec 8 Contract Number	Expiration Date	Partial	Sec 8 Contract Renewal Type	Preservation Office	Recommended PAE Name	Cumulative Property Assignment	Property Assignment Cap
<input checked="" type="checkbox"/>	SENIOR HERITAGE PLAZA	COLORADO SPRINGS	CO	C0997851004	10/29/2027	<input type="checkbox"/>	Full		Colorado Housing & Finance Authority	15	0
<input checked="" type="checkbox"/>	BRITTANY COURT	Gardner	KS	KS16H156001	07/31/2008	<input type="checkbox"/>	Lite		No Assigned PAE	0	0
<input checked="" type="checkbox"/>	PINE TERRACE APTS	LAWTON	OK	OK360013006	06/30/2010	<input type="checkbox"/>	Full		No Assigned PAE	0	0

Enter Your Name: (First name, last name)

Enter the Initial Assignment Date:

Before proceeding to another screen, save all changes by selecting the SUBMIT button.

[HUDweb Housing](#) | [HUDweb Help](#) | [HUDweb Search](#) | [HUDweb Home](#) | [Privacy](#) |

[Secure Systems](#)
[Log Off](#)

Review / Assign Assets

The following 3 out of 3 properties met your **All** search criteria.

☒ next to each property that you are assigning to a PAE. All of the contracts associated with the property will be assigned.

> box next to each property ID to add any comments.

en below to save your assignments.

Property City	State	Sec 8 Contract Number	Expiration Date	Partial	Sec 8 Contract Renewal Type	Preservation Office	Recommended PAE Name	Cumulative Property Assignment	Property Assignment Cap	Current Active Assignment	Indigible
COLORADO SPRINGS	CO	C099T851004	10/29/2027	<input type="checkbox"/>	Full		Colorado Housing & Finance Authority	15	0	2	<input type="checkbox"/> C
Gardner	KS	KS16H156001	07/31/2008	<input type="checkbox"/>	Lite		No Assigned PAE	0	0	0	<input type="checkbox"/> C
LAWTON	OK	OK560013006	06/30/2010	<input type="checkbox"/>	Full		No Assigned PAE	0	0	0	<input type="checkbox"/> C

Enter Your Name: (First name, last name)

Enter the Initial Assignment Date:

Before proceeding to another screen, save all changes by selecting the SUBMIT button.

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 [HUDweb Help](#) |
 [HUDweb Search](#) |
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 [Privacy](#)

Figure 6-10, Review/Assign Assets Screen

The following steps direct users in making property assignments in the M2M system (for each property that will be assigned to a PAE):

1. Review property data to ensure that it is accurate and complete

Note: Only one contract is displayed for each property. All contracts associated with the property will be assigned to the PAE with the one displayed.

2. Review the Contract Renewal Type field for the property to ensure that it is accurate. If necessary, click the drop-down box to change the renewal option (This change should only be made with the documentation from the HUD Field Office or owner verifying the renewal option).

Sec 8 Contract Renewal Type

Full

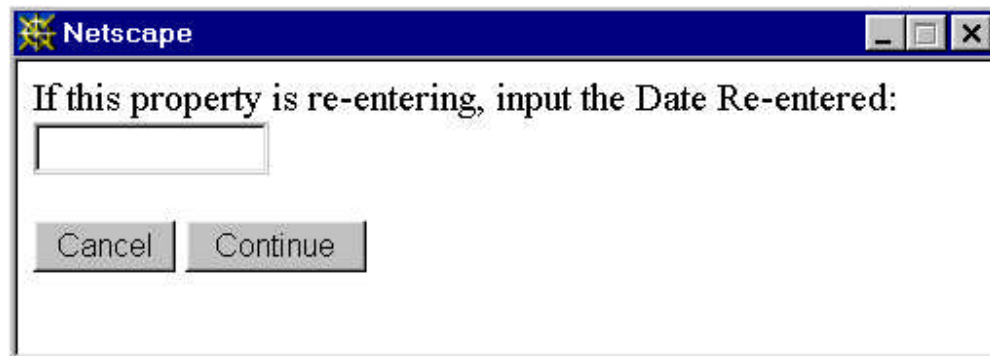
Lite

Full

Comp

Opt Out

3. A pop-up window with the text 'If this property is re-entered, input the Data Re-entered:', and an input field shall be displayed if previously approved rent reduction only (lite) is changed to a mortgage restructuring (full).



If this property is re-entering, input the Date Re-entered:

♪ **Note:** This change is only effective within the M2M system and it may be necessary to contact other representatives of other systems to correct or update data.

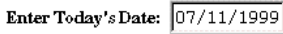
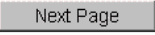
4. Review the Recommended PAE Name generated by M2M. If there is no recommended PAE (based on the predefined criteria), the property will have "No Assigned PAE" as its Recommended PAE Name

No Assigned PAE

If there is no recommended PAE or to select a different PAE than what was recommended, click the Recommended PAE Name button to select one from a list of PAEs. Click the Continue button to save the PAE selected from the list.

5. Click the Assign check box ☐ next to the Property ID to indicate assignment approval
6. If desired, click the Comment Box to enter any comments about the property assignment
7. If desired, click the Partial check box ☐ next to the Expiration Date to indicate the property is to be a partial assignment (for a Mortgage Restructuring Plan only)
8. Repeat steps 1-6 for each additional property assignment
9. You may alternately designate the property as being Ineligible by clicking the Ineligible check box and entering a comment in the Ineligible Comment Box
10. After all property assignments have been made, enter your first name, middle initial, and last name in the Enter Your Name field

Enter Your Name:

11. The system date is populated in the Enter Today's Date field. If necessary, it may be overwritten by the end-user with the correct initial assignment date. This is the data that populates the critical dates field for the initial assignment 
12. Click the Assign Assets button  to make the property assignments to the PAE or to save your selections before going to the next page (by clicking the Next Page button ) to make additional property assignments

The property-to-PAE assignment will not be created by M2M unless there is a check mark in the **Assign** box, values in the **Contract Renewal Type** and **Recommended PAE Name** fields (for each assigned property), in addition to the OAHP HQ approver's name in the **Enter Your Name** field.

Any property that is not assigned when the assignments are made will be available the next time the **Review/Assign Assets** page is retrieved (depending upon the selection criteria used). Assets that were accurately assigned will not be retrieved on the page (unless they are later unassigned from the PAE and consequently returned to the pool).

The system will return a confirmation screen upon a successful assignment.

6.8.2 Assignment Dated Fields

The date the property is assigned automatically populates **OAHP Initial Assignment Date** field in the **Critical Dates Tracking** module for the specific asset. The PAE must submit Conflict of Interest Form 2.2 for clearance before the Asset is Accepted by the PAE date is filled in.

The PAE has three days after the assignment by OAHP HQ to accept or decline the assignment. If the PAE declines the assignment after the property is assigned to them, the OAHP HQ user must unassigned the property by going into the **View/Update PAEs** module, selecting the PAE, and entering a check mark in each **Unassigned Property** box under the **Assigned Properties** section, and saving the changes. This will make the property available for reassignment to another PAE in the **Review/Assign Assets** screen. More detail on this PAE/property unassignment may be found in **Section 6.3, View/Update PAEs Screen**.

For each property assignment, OAHP HQ should review the **Critical Dates Tracking** screen to confirm the dates and data entered for the contracts assigned to the PAEs have complete and accurate data pulled from REMS.

6.9 Review M2M Assets Potentially Eligible for Mark-Up-To-Market But Not Yet Received

This function allows OAHP HQ users to enter the Referral Receipt Date and Referral Date for multiple properties at a time instead of going through each property's Critical Dates Tracking screen. The search screen allows selecting ALL Properties Potentially Eligible for Mark-Up-To-Market, But Not Yet Received. The screen is depicted below in Figure 6-11, Review M2M Asset Potentially Eligible for Mark-Up-To-Market But Not Received Screen.

[Home](#)
[Back](#)
[Log Off](#)

Review M2M Assets Potentially Eligible for Mark-Up-To-Market, but not yet received

The following 4 out of 4 properties met your All search criteria.

- Check the Add box(☒) next to each property that you are adding a referral receipt date.
- Click the Submit button below to save your additions.

Add	Property Name	Property City	State	Sec 8 Contract Number	Expiration Date	Renewal Type Completed As	Referral Receipt Date	Referral Date
<input type="checkbox"/>	Magnolia Village	AMERICUS	GA	GA06L000006	05/31/1999	Full	<input type="text" value="12/11/2002"/>	<input type="text" value="12/11/2002"/>
<input type="checkbox"/>	CARMICHAELS ARBORS	CARMICHAELS	PA	PA280015017	08/12/1999	Full	<input type="text" value="12/11/2002"/>	<input type="text" value="12/11/2002"/>
<input type="checkbox"/>	MON VIEW HEIGHTS	WEST MIFFLIN	PA	PA28L000026	08/31/1999	Full	<input type="text" value="12/11/2002"/>	<input type="text" value="12/11/2002"/>
<input type="checkbox"/>	LAKEVIEW TERRACE APTS	CHAMBERLAIN	SD	SD99M000026	04/30/2000	Full	<input type="text" value="12/11/2002"/>	<input type="text" value="12/11/2002"/>

Enter Your Name: (First name, middle initial, last name)

Before proceeding to another screen, save all changes by selecting the SUBMIT button.

[HUDweb Housing](#) |
 [HUDweb Help](#) |
 [HUDweb Search](#) |
 [HUDweb Home](#) |
 [Privacy](#) |

Figure 6-11, Review M2M Assets Potentially Eligible for Mark-Up-To-Market But Not Received Screen

To add or change the information for a property, check the Add box, enter the Referral Receipt Date and the Referral Date, your name, and click the SUBMIT button.

6.10 Review M2M Assets Requesting Mark-Up-To-Market Received at OAHP waiting PAE Assignment

This function allows OAHP HQ users to assign properties requesting Mark-up-to-Market Comp Reviews to a PAE. The search screen allows selecting ALL Properties Requesting Mark-Up-To-Market Received at OAHP waiting PAE Assignment. The screen is depicted below in Figure 6-12, Review M2M Asset Requesting Mark-Up-To-Market Received at OAHP waiting PAE Assignment Screen.

[Home](#)
[Back](#)
[Log Off](#)

Review / Assign Assets

The following 1 out of 1 properties met your All search criteria.

- Check the Assign box (☒) next to each property that you are assigning to a PAE. All of the contracts associated with the property will be assigned.
- Click the Submit button below to save your assignments.

Assign	Property Name	Property City	State	Sec 8 Contract Number	Expiration Date	Renewal Type Completed As	Regional Office	Recommended PAE Name	Cumulative Property Assignment	Property Assignment Cap	Current Active Assignment
<input type="checkbox"/>	OXFORD PLACE	PROVIDENCE	RI	RI43H023013	01/24/2000	Lite	New York	Rhode Island Housing & Mortgage FC	4	20	3

Enter Your Name: (First name, middle initial, last name)

Enter the Initial Assignment Date:

Before proceeding to another screen, save all changes by selecting the SUBMIT button.

[HUDweb Housing](#) |
 [HUDweb Help](#) |
 [HUDweb Search](#) |
 [HUDweb Home](#) |
 [Privacy](#)

Figure 6-12, Review M2M Assets Requesting Mark-Up-To-Market Received at OAHP waiting PAE Assignment Screen

To assign a property, check the **Assign Box**, select a **Preservation Office** and a **PAE**, enter **your name** and a **date**, and click the **SUBMIT** button.

6.11 Assigned Properties Pending C.O.I. Approval and/or Referral receipt

This function allows OAHP HQ users to enter the COI Approval Date and/or Referral Date for multiple properties at a time instead of going through each property's Critical Dates Tracking screen. The search screen allows selecting properties by PAE Name or ALL Properties Pending C.O.I. Approval and/or Referral Receipt. Only assigned properties that do not already have both a COI Approval Date and Referral Date are selected. The screen is depicted below in Figure 6-13, Assigned Properties Pending C.O.I. Approval and/or Referral Receipt Screen.

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Assigned Properties Pending C.O.I. Approval and/or Referral Receipt

The following 5 out of 5 properties are the result of your Florida Housing Finance Corporation PAE search.

Property ID	Property Name	City	State	Renewal Type	OAHP Initial Assignment Date	OAHP Receives Referral from Field Office	OAHP Approves C.O.I. Form 2.2
800003971	CARAVAN APTS	JACKSONVILLE	FL	Full	07/20/1999	09/27/1999	
800004066	EMERSON ARMS	JACKSONVILLE	FL	Lite	08/19/1999		
800004329	OAKLAND TERRACE	JACKSONVILLE	FL	Lite	07/06/1999	11/11/1999	
800004331	OAKWOOD TERRACE I	PENSACOLA	FL	Lite	07/07/1999		
800004524	TROPICAL MANOR APARTMENTS	MERRITT ISLAND	FL	Lite	08/19/1999		

Enter Your Name: (First name, last name)

Before proceeding to another screen, save all changes by clicking the Save Changes button above.

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Figure 6-13, Assigned Properties Pending C.O.I. Approval and/or Referral Receipt Screen

To add or change the information for a property, enter the Referral Receipt Date and/or COI Approval Date, your name, and click the Save Changes button.

6.12 Assign/Update Portfolio Manager

This function allows OAHP HQ users to assign or update the Portfolio Manager for the selected properties. The search screen allows selecting properties by REMS ID, FHA Number, Property Name, State, PAE Name, Portfolio Manager, Closing Date, Assignment Status or ALL Assigned Properties. The Search screen is depicted below in Figure 6-14-1, Select Search Criteria for Assign/Update Portfolio Manager Screen. The Portfolio Manager screen is depicted below in Figure 6-14-2, Assign/Update Portfolio Manager Screen. Removing or changing the Portfolio Manager of a property will generate a history record of the action.

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Select Search Criteria for Assign/Update Portfolio Manager

Select one of the following criteria:

REMS ID:

FHA #:

Or select one or more of the following options:

Property:

State:

Portfolio Manager:

Closing Date:

Assignment Status:

Or click [HERE](#) to get ALL properties.

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Figure 6-14-1, Select Search Criteria for Assign/Update Portfolio Manager Screen

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Assign/Update Portfolio Manager Of Assigned Properties

The following is the result of your 800000093 property search.

Enter all dates in mm/dd/yyyy format.
 Enter **Date Unassigned** before you reassign a new portfolio manager.
 To assign/reassign Portfolio Manager, enter manager's name first. Then enter **Date Assigned**.
 Click the **Save Changes** button to save all updates/changes.

PAE Name	Status	Property ID	Property Name	City	State	Portfolio Manager Name	Date Assigned	Date Unassigned	New Portfolio Manager Name	Date Assigned
ONTRA, Inc.	C	800000093	EXECUTIVE ESTATES	FAIRBANKS	AK	R.E.R., Inc.	11/ 19/ 2002			

Before proceeding to another screen, save all changes by clicking the Save Changes button above.

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Figure 6-14-2, Assign/Update Portfolio Manager Screen

To assign/change the Portfolio Manager for a property, select from the drop down options.

6.13 Update Rehab Escrow Account Closed Date

This function allows OAHP HQ users to update the Rehab Escrow Account Closed Date for the selected properties. The search screen allows selecting properties by REMS ID, FHA Number, Property Name, State, Closing Date, Rehab Escrow Account Status or ALL Assigned Properties. The Search screen is depicted below in Figure 6-15-1, Select Search Criteria for Update Rehab Escrow Account Closed Date Screen. The Update Rehab Escrow Account Closed Date Screen is depicted below in Figure 6-15-2, Update Rehab Escrow Account Closed Date Screen. Removing or changing the Portfolio Manager of a property will generate a history record of the action.

Figure 6-15-1, Select Search Criteria for Update Rehab Escrow Account Closed Date Screen

PAE Name	Status	Property ID	Property Name	City	State	Rehab Escrow Account Closed Date
ONTRA, Inc.	C	800000083	AYALPIK APARTMENTS	BETHEL	AK	<input type="text"/>

Figure 6-15-2, Update Rehab Escrow Account Closed Date Screen

To Update Rehab Escrow Account Closed Date for a property, enter the Rehab Escrow Account Closed Date in mm/dd/yyyy format, and click the **Save Changes** button.

6.14 Change Preservation Office Screen

This function allows OAHP HQ users to change the assigned Preservation Office for the selected properties. The search screen allows selecting properties by State, PAE Name, Property ID, or ALL Assigned Properties. The screen is depicted below in Figure 6-16, Change Preservation Office Screen. Changing the Preservation Office of a property will generate a history record of the action.

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Preservation Office Changes Of Assigned Properties

The following 5 out of 5 properties met your MASSACHUSETTS HOUSING FINANCE AGENCY PAE search criteria.

Status	Property ID	Property Name	City	State	Renewal Type	Preservation Office
A	800008520	GRANITE PLACE	QUINCY	MA	Full	Centralized Closing
A	800008606	JUDSON HOUSE	HAVERHILL	MA	Comp	New York
A	800008744	OLDE ENGLISH VILLAGE	GARDNER	MA	Lite	New York
A	800008749	ORANGE APARTMENTS	SPRINGFIELD	MA	Lite	New York
A	800008918	TANNERY II	PEABODY	MA	Lite	New York

Preservation Office Change
Date:
(mm/dd/yyyy)

Before proceeding to another screen, save all changes by clicking the Save Changes button above.

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Figure 6-16, Change Preservation Office Screen

To change the Preservation Office for a property, select from the drop down options,

enter the **Change Date** (defaulted to current date), and click the **Save Changes** button.

6.15 Ineligible Properties Screen

This function allows OAHP HQ users to reactivate properties that have been designated as Ineligible. The search screen allows selecting properties by State, Property ID, or ALL Ineligible Properties. The screen is depicted below in Figure 6-17, Ineligible Properties Screen.

Property ID	Property Name	City	State	Date Selected As Ineligible	Comments	Reactivate Ineligible Property
800007194	DALE APARTMENTS	COFFEYVILLE	KS	11/06/2000	Allan bird Property	<input type="checkbox"/>
800007254	HILLSIDE TERRACE APTS	PRAIT	KS	04/25/2001	Mark Up to Market - according to REIMS	<input type="checkbox"/>
800007262	JESSE COUP APTS	HOPE	KS	11/08/2000	demo	<input type="checkbox"/>
800007329	Osage Trails/Westgate Homes	PARSONS	KS	11/15/2000	Alan Bird property, HUD Hub performing the RCS	<input type="checkbox"/>
800007356	PLAZA APARTMENTS	COFFEYVILLE	KS	11/06/2000	Allan Bird Property	<input type="checkbox"/>

Enter Your Name: (First name, middle initial, last name)

Enter Eligibility Date:

Before proceeding to another screen, save all changes by clicking the Save Changes button.

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Figure 6-17, Ineligible Properties Screen

To reactivate a property, click the **checkbox** for the desired properties, enter your **name**, the **Eligibility Date** (defaulted to current date), and click the **Save Changes** button.

7 CRITICAL DATES TRACKING MODULE

The Critical Dates Tracking module is accessed by clicking the **Critical Dates Tracking** button on M2M's home screen. Within the Critical Dates Tracking module, OHAP users may enter and modify critical date fields and their associated comments, view any associated history information, change the renewal type (HQ only), and end the M2M process.

Clicking **Critical Dates Tracking** button retrieves a search selection criteria page, similar to other search criteria screens, as shown below in Figure 7-1, Search Criteria for Critical Dates Tracking Screen.

Figure 7-1, Search Criteria for Critical Dates Tracking Screen

Select one of the following criteria available to retrieve properties for the **Critical Dates Tracking** module:

- ◆ Enter a REMS ID for a specify property
- ◆ Enter a FHA Number for a specific property

Or select one or more of the following options available to retrieve properties for the **Critical Dates Tracking** module:

- ◆ Select a **State** from the drop-down list
- ◆ Select a **PAE** from the drop-down list
- ◆ Select a **Deb Restructuring Specialist** from the drop-down list
- ◆ Enter a Property's Name for a specific property
- ◆ Select a Property's **Status** (Active or Completed)

- ◆ Select a **Renewal Type** (Mortgage Restructuring, Rent Reduction only, Comp Review or Post M2M Comp Review)
- ◆ Click the underlined **HERE** link to retrieve all properties in the system

7.1 Assigned Properties Screen

The **Assigned Properties** screen (shown below as Figure 7-2, Assigned Properties) will be returned once the search is performed (based on the criteria on the Select Search page).

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Assigned Properties

The following **2** out of **2** properties met your **Active, Mortgage Restructuring** search criteria.

To view/update a contract's critical dates, click its underlined **Contract Number**.

Status	Property Name	Sec 8 Contract Number	Sec 8 Contract Renewal Type	Expiration Date	Property City	State
A	MT VERNON PLAZA II	OH160001001	Mortgage Restructuring	09/13/1999	COLUMBUS	OH
A	SKYLINE TERRACE	OH12M000095	Mortgage Restructuring	06/30/1999	CANTON	OH

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Figure 7-2, Assigned Properties

All of the assigned properties that have a renewal option will be displayed (based on the criteria used to select property) and have a link to a **Critical Dates Tracking** form.

7.2 Contract Number Link

The **Assigned Properties** screen displays all assigned properties and pertinent information. It also contains the highlighted **contract number** [FL29M000113](#) as a link to access the **Critical Dates Tracking** form to enter or view the critical dates. The contract highlighted will be the first expiring contract for the property. The resulting screen is the **Critical Dates Tracking** screen (discussed in the next section).

7.3 Critical Dates Tracking Screen

After a contract link is selected, a Critical Dates Tracking screen is retrieved (based on the property's M2M renewal option type). Figure 7-3, Mortgage Restructuring Critical Dates Screen, on the next page, provides an example of a Critical Dates Tracking screen for a property with a Mortgage Restructuring renewal option. The **Critical Dates Tracking** screens vary depending upon the M2M renewal type.

Figure 7-3-1, Mortgage Restructuring Critical Dates Screen (Partial), on the following page provides an example of a Critical Dates Tracking screen for a property designated as a partial assignment. HQ users may check the steps that need to be performed by the PAE and also enter a due date for selected steps. Only the steps that are checked or have a due date will be displayed to the PAE. Preservation Office users may input due dates, but cannot select any of the other steps.

Figure 7-3-2, Rent Reduction only Critical Dates Screen, on the next page, provides an example of a Critical Dates Tracking screen for a property with a Rent Reduction only renewal option.

Figure 7-3-3, Rent Reduction only Critical Dates Screen (Partial), on the following page provides an example of a Critical Dates Tracking screen for a property designated as a partial assignment. HQ users may check the steps that need to be performed by the PAE and also enter a due date for selected steps. Only the steps that are checked or have a due date will be displayed to the PAE. Preservation Office users may input due dates, but cannot select any of the other steps.

Figure 7-3-4, Post M2M Comp Review Critical Dates Screen, on the following page provides an example of a Critical Dates Tracking screen for a property designated as a Mark-Up-To-Market Comp Review assignment.

Figure 7-3, Mortgage Restructuring Critical Dates Screen

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Figure 7-3-1, Mortgage Restructuring Critical Dates Screen (Partial)

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Critical Dates Tracking

HEREMS Property ID: 800000142
Primary FHA Number: 0623361
Contract Number: AL090022063
Preservation Office: Chicago
HUD Project Manager:
Debt Restructuring Specialist: PATRICIA AMERSON
OAHP/PAE Underwriter: NANCY J RICHARDS

Property Name: ANGEL APARTMENTS
PAE Name: Jefferson County Assisted Housing Corp.
Renewal Type: Rent Reduction Only

[To view previous PAE or Critical Dates for previous renewal type or previous Portfolio Manager, click on Historical Data link below:](#)
[Historical Data](#)

Previously Assigned PAE: Jefferson County Assisted Housing Corp.
Previous Renewal Type: Mortgage Restructuring
Previous Preservation Office: Washington
[To view or update the OAHP comments log, click on the OAHP Comment Log link below:](#)
[OAHP Comment Log](#)

There are -1398 days left until this Section 8 contract expires.
This contract is currently in the **Assignment/Assessment** phase.

If there was a successful appeal from the owner, click here to: [Update the Rents](#)

Enter all dates in mm/dd/yyyy format
Click the **Save** button near the bottom of this screen to save all updates/changes.

Original Section 8 Expiration Date (Post MAHRA):	01/06/2002	
Current Section 8 Expiration Date:	09/30/2004	<input type="button" value="C"/>
Field Office Receives Request for Rent Reduction from Owner:	10/07/2003	
Field Office Refers to OAHP:		
OAHP Receives Referral from Field Office:		

Phase: Assignment/Assessment

OAHP Sends List of Potential Assets:	08/29/2001	
OAHP Approves COI Form 2.2:		
PAE Accepts Assignment:		<input type="button" value="Save and Continue"/>
PAE's estimated Recommendation (Form 10.2) Submission Date:		<input type="button" value="C"/>
Tier 1 Incentive Due Date (Per FRA):		
Amended Tier 1 Incentive Due Date:		<input type="button" value="C"/>
Amended Tier 1 Due Date (Per Rel. Mgr.):		<input type="button" value="C"/>
Tier 2 Incentive Due Date (Per FRA):		
Amended Tier 2 Incentive Due Date:		<input type="button" value="C"/>
Amended Tier 2 Due Date (Per Rel. Mgr.):		<input type="button" value="C"/>
OAHP Places Property On Hold:		<input type="button" value="C"/>
Anticipated On Hold Removal Date:		<input type="button" value="C"/>
OAHP Removes Property From On Hold:		<input type="button" value="C"/>

Phase: Rent Reduction Determination

Tenant Notice Sent:		<input type="button" value="C"/>
FCA Assigned by PAE:		<input type="button" value="C"/>
Appraisal Assigned by PAE:		<input type="button" value="C"/>
PAE's FCA Complete:		<input type="button" value="C"/>
PAE's Appraisal Complete:		<input type="button" value="C"/>
Initial PAE Restructuring Plan Submission to OAHP:		
PAE Submits Justification for Recommendation (Form 10.2):		<input type="button" value="C"/>
OAHP Receives Complete PAE Justification (Form 10.2) Submission:		<input type="button" value="C"/>
OAHP Approves PAE 'Lite' Recommendation:		<input type="button" value="C"/>
OAHP Notifies HUD Project Manager:		<input type="button" value="C"/>
PAE Sends New Sec. 8 Contract to Owner and Notifies HUD Project Manager:		<input type="button" value="C"/>
PAE Receives Copy of Owner's Signed Sec. 8 Contract:		<input type="button" value="C"/>

Status of Miscellaneous Items

PAE Notifies Owner of Recommendation to Convert to Mortgage Restructuring:		<input type="button" value="C"/>
OAHP Approves Tier 2 Conversion (Form 2.16):		<input type="button" value="C"/>
OAHP Returns Submission to PAE for Revision:		<input type="button" value="C"/>
OAHP Receives PAE Resubmission:		<input type="button" value="C"/>
Number of Resubmissions:	0	
New Section 8 Contract Effective Date:		<input type="button" value="C"/>
Section 8 Contract Type:		<input type="button" value="C"/>

☐ Clear Option Selected Below
☐ Renew as Tier 1
☐ Renew as Tier 2
☐ Watchlist - **Ineligible, Recommended Conversion to Full**
☐ Not to Renew
☐ Ineligible for Mark-to-Market - Rents below or equal to Market
☐ Ineligible for Mark-to-Market - Other
☐ Owner Opt's Out of Section 8 Program

OAHP Comment Text:
PAE Comment Text:

Click here to go to Restructuring Plan for Form 10.2.

Click here if completed the M2M program.

Click here to change the M2M Renewal Type. (Approved Form 2.16 Required)

Figure 7-3-2, Rent Reduction Only Critical Dates Screen

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Critical Dates Tracking (Partial)

HEREMS Property ID: 80006288

Primary FHA Number: 07135436

Contract Number: IL06A001002

Preservation Office: Chicago

HUD Project Manager: KEN JONES

Debt Restructuring Specialist: F. DENNISON SHAW, JR.

OAHP/PAE Underwriter:

Property Name: ROOSEVELT INDEPENDENCE

PAE Name: Heskin Signet Partnership

Renewal Type: Rent Reduction Only

To view previous PAE or Critical Dates for previous renewal type or previous Portfolio Manager, click on Historical Data link below:

Historical Data

Previously Assigned PAE: City of Chicago Department of Housing

Previous Renewal Type: Mortgage Restructuring

To view or update the OAHP comments log, click on the OAHP Comment Log link below:

OAHP Comment Log

There are **-576** days left until this Section 8 contract expires.

This contract is currently in the **Red Reduction Determination** phase.

If there was a successful appeal from the owner, click here to: [Update the Rents](#)

Enter all dates in **mm/dd/yyyy** format.

Click the **Save** button near the bottom of this screen to save all updates/changes.

Original Section 8 Expiration Date (Post MAHRA):

Current Section 8 Expiration Date: 12/31/2006

Field Office Receives Request for Rent Reduction from Owner: 08/30/2006

Field Office Refers to OAHP:

OAHP Receives Referral from Field Office:

Phase: Assignment/Assessment

OAHP Sends List of Potential Assets: 12/13/2005

OAHP Approves COI Form 2.2:

PAE Accepts Assignment: 01/02/2006

PAE's estimated Recommendation (Form 10.2) Submission Date: 03/17/2006

OAHP Places Property On Hold: 01/17/2006

Anticipated On Hold Removal Date: 02/01/2006

OAHP Removes Property From On Hold:

Phase: Rent Reduction Determination	Due/Select	Actual
Tenant Notice Sent:	<input checked="" type="checkbox"/>	04/01/2006 <input type="button" value="C"/>
PCA Assigned by PAE:	<input checked="" type="checkbox"/>	<input type="button" value="C"/>
Appraisal Assigned by PAE:	<input checked="" type="checkbox"/>	<input type="button" value="C"/>
PAE's PCA Complete:	<input checked="" type="checkbox"/>	<input type="button" value="C"/>
PAE's Appraisal Complete:	<input checked="" type="checkbox"/>	<input type="button" value="C"/>

OAHP Comment Text:

PAE Comment Text:

[Restructuring Plan](#) Click here to go to Restructuring Plan for Form 10.2.

[End M2M Process](#) Click here if completed the M2M program.

[Change Renewal Type](#) Click here to change the M2M Renewal Type. (Approved Form 2.16 Required)

[Go Back To Select Search Criteria for Critical Dates Tracking Screen](#)

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Figure 7-3-3, Rent Reduction Only Critical Dates Screen (Partial)

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Critical Dates Tracking

HEREMS Property ID: 80000254
Primary FHA Number: 06244041
Contract Number: FL120MR2345
Preservation Office: New York
HUD Project Manager: PAT ALLEN
Debt Restructuring Specialist:

Property Name: FAIRLANE MEADOWS
PAE Name: VENCOR, INC.
Renewal Type: Post M2M Comp Review

[To view or update the OAHP comments log, click on the OAHP Comment Log link below:](#)
[OAHP Comment Log](#)

There are **-1148** days left until this Section 8 contract expires.
 This contract is currently in the **Assignment/Assessment** phase.

Enter all dates in mm/dd/yyyy format

Click the **Save** button near the bottom of this screen to save all updates/changes

Original Section 8 Expiration Date (Post MAHRA):

Current Section 8 Expiration Date: 09/18/2001 **Mod Rehab**

Field Office Receives Intent to Renew from Owner:

Field Office Refers to OAHP:

OAHP Receives Referral from Field Office:

Phase: Assignment/Assessment

OAHP Sends List of Potential Assets: 02/18/2004

OAHP Approves COI Form 2.2:

PAE Accepts Assignment:

PAE's estimated Comp Review submission Date:

Complete Comp Review Due (per PRA):

Amended Due Date (Per Rel Mgr):

Phase: Comparability Review

PAE Submits Review Results to OAHP:

OAHP Approves Review Results:

OAHP Returns Review Results to PAE for Revision:

PAE Notifies HUD Field Office:

OAHP Receives Complete Comp Review:

OAHP Receives PAE Resubmission:

Number of Resubmissions:

☒ Review in Process
☐ Section 8 Contract Rent Over Market
☐ Section 8 Contract Rent Equal/Under Market

Approved Review Results:

OAHP Comment Text:

PAE Comment Text:

Click here if completed the M2M program.

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Figure 7-3-4, Post M2M Comp Review Critical Dates Screen

7.3.1 Historical Data Display

If there is any historical data for a property, a link and previous values will appear near the top of the Critical Dates Tracking screen as show below in Figure 7-4, History Notice.

The screenshot shows the 'Critical Dates Tracking' screen. At the top, there are navigation buttons: Home, Back, Secure Systems, and Log Off. Below these, the title 'Critical Dates Tracking' is centered. The screen is divided into two columns of property information. The left column includes: HEREMS Property ID: 800000170, Primary FHA Number: 06235213, Contract Number: AL090015023, Preservation Office: Washington, and HUD Project Manager: SARAH RICHEY. The right column includes: Property Name: BRADLEY PARK, PAE Name: Jefferson County Assisted Housing Corp., and Renewal Type: Mortgage Restructuring. Below the left column, there is a 'Debt Restructuring Specialist' dropdown menu. To the right of this, there are fields for 'Portfolio Manager', 'Date Assigned', and 'Re-entered'. A blue text notice states: 'To view previous PAE or Critical Dates for previous renewal type or previous Portfolio Manager, click on Historical Data link below:'. Below this notice is a red link labeled 'Historical Data'. At the bottom, it says 'Previous Renewal Type: Mortgage Restructuring'.

Figure 7-4, History Notice

To see a summary of the historical actions, click the **Historical Data** link to display the Historical Data screen as shown in Figure 7-5, Historical Data Summary Screen.

The screenshot shows the 'Historical Data for Property # S00000000 EXECUTIVE ESTATES' screen. It includes a blue text notice: 'To view previous critical date detail, click on [Renewal Type](#) or [PAE unassignment](#) or [Reactivation](#) or [Portfolio Manager](#) link(s) below:'. Below this is a table with the following data:

Changed Information	From	To	On	By
Regional Office	San Francisco	OMHAR Transaction Center	05/09/2001	H14141
Regional Office	OMHAR Transaction Center	Washington	03/12/2003	C19725
Portfolio Manager	R.E.R., Inc.		11/18/2003	C12258

Figure 7-5, Historical Data Summary Screen

The Critical Date Detail, saved at the time the action was performed, can be viewed by clicking the **Renewal Type** or **PAE unassignment** or **Reactivation** links. Shown below, in Figure 7-6, Historical Critical Date Detail Screen, is a sample display. Clicking the **Portfolio Manager** link will display a popup window showing the date the indicated portfolio manager was assigned.

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Saved Critical Dates

HEREMS Property ID: 800010019 Primary FHA Number: 04435500 Contract Number: MI280013030 Preservation Office: Chicago Debt Restructuring Specialist: TAJUANA A CARROL OAHP/PAE Underwriter:	Property Name: CLINTON PLACE PAE Name: OAHP Chicago - Signet Renewal Type: Mortgage Restructuring Re-entered:
---	--

Original Section 8 Expiration Date (Post MAHRA) :
 Current Section 8 Expiration Date : 10/31/2011
 Field Office Receives Intent to Renew from Owner : 06/20/2011
 Field Office Refers to OAHP :
 OAHP Receives Referral from Field Office : 07/29/2008

Assignment/Assessment

OAHP Sends List of Potential Assets: 08/01/2008
 OAHP Approves COI Form 2.2: 08/05/2008
 PAE Accepts Assignment: 08/11/2008
 PAE's estimated Restructuring Plan (Form 5.2) Submission Date:
 Amended PRA Milestone Date Per 2.15 Waiver: 04/30/2009
 Reason: Plan Submission
 OAHP Places Property On Hold:
 Anticipated On Hold Removal Date:
 OAHP Removes Property From On Hold:

Data Collection/Due Diligence

PAE and Owner Have Kickoff Meeting: 08/21/2008
 PCA Assigned by PAE: 08/26/2008
 PAE Sends Documents to Reviewer:
 GPCA Reviewer:
 OAHP Returns Documents for Fixes:
 PAE Resubmits Documents:
 OAHP Approves GPCA:
 Appraisal Assigned by PAE: 08/26/2008
 Tenant Meeting - #1: 09/24/2008
 Owner Submits Data Collection Report: 09/16/2008
 PAE's PCA Complete: 10/03/2008
 PAE's Appraisal Complete: 09/25/2008
 PAE Completes Due Diligence: 10/03/2008
 Title Bring Down Order: 08/27/2008
 Title Bring Down Received: 09/08/2008

Underwriting/Restructuring Plan

Tenant Meeting - #2:
 PAE Submits Restructuring Plan to OAHP:
 OAHP Receives Complete Restructuring Plan and Form 5.2:
 Date Assigned to Underwriter:
 Reviewer: FA Staff
 No

Loan Funding/Approval Process

OAHP Approves Restructuring Plan:
 OAHP Returns Restructuring Plan to PAE for Revision:
 OAHP Receives PAE resubmission:
 Number of Resubmissions: 0
 Restructuring Plan Executed by OAHP:
 Restructuring Commitment Executed by Owner:
 M2M Green Initiative: Level I Green
 Closing Issues:
 Other Issues:
 Other Comment:

Closing and Post Closing

OAHP approved 4.11 or 4.12:
 Scheduled Closing Date:
 Closing Date:
 New Section 8 Contract Effective Date:
 Section 8 Contract Type:
 Closing Documents Distributed by PAE:
 Transmission Memo submitted to Multifamily Housing:
 Rehab Escrow Account Closed:
 Multifamily indicated no meeting was necessary:

Date Action Other than Closing Occurred:

OAHP Comment:

PAE Comment:

Figure 7-6, Historical Critical Date Detail Screen

7.3.2 OAHP Comment Log

If there is any OAHP Comment Log for a property, a link will appear near the top of the Critical Dates Tracking screen as show below in Figure 7-5, OAHP Comment Log Notice.

The screenshot shows the 'Critical Dates Tracking' screen. At the top, there are navigation buttons: Home, Back, Secure Systems, and Log Off. Below these, the title 'Critical Dates Tracking' is centered. The screen is divided into two columns of information. The left column contains: HEREMS Property ID: 800000170, Primary FHA Number: 06235213, Contract Number: AL090015023, Preservation Office: Washington, and HUD Project Manager: SARAH RICHEY. The right column contains: Property Name: BRADLEY PARK, PAE Name: Jefferson County Assisted Housing Corp., Renewal Type: Mortgage Restructuring, Portfolio Manager: (blank), Date Assigned: (blank), and Re-entered: (blank). Below the left column, there is a 'Debt Restructuring Specialist' dropdown menu. A note states: 'To view previous PAE or Critical Dates for previous renewal type or previous Portfolio Manager, click on Historical Data link below:'. Below this note is a link labeled 'Historical Data'. Another note states: 'To view or update the OAHP comments log, click on the OAHP Comment Log link below:'. Below this note is a link labeled 'OAHP Comment Log'. At the bottom, it says 'Previous Renewal Type: Mortgage Restructuring'.

Figure 7-7, OAHP Comment Log Notice

To see a list of the OAHP Comments Log, click the **OAHP Comment Log** link to display the OAHP Comment Log screen as shown in Figure 7-8, OAHP Comment Log Screen.

The screenshot shows the 'OAHP Comment Log' screen. At the top, there are navigation buttons: Home, Back, Secure Systems, and Log Off. Below these, the title 'Comment Log for Property # 800003910 ATLANTIC ARMS EAST APARTMENTS' is centered. Below the title, there is a section with instructions: 'To add a new comment, scroll down to the empty comment box.', 'To update an existing comment, click its underlined Date.', 'To delete an existing comment, click its underlined Date, then remove comments from the comment box and click the Save button.' Below the instructions, there is a table with three columns: Date, User, and Comment. The table contains one row with the following data: Date: Mar 24 2003 4:00PM, User: LING-JANE LIN, and Comment: testing. Below the table, there is a section titled 'Add/Edit a comment' with a large text area for input. At the bottom of this section, there are 'Cancel' and 'Save' buttons. Below the 'Save' button, there is a button labeled 'Go Back To Critical Dates Tracking Screen'.

Figure 7-8, OAHP Comment Log screen

7.3.3 Critical Dates Data Entry

All **Critical Dates** data entry boxes applicable to the PAE or OAHP User may be entered or updated by the OAHP HQ users. The OAHP RO Users may enter or update the critical date fields applicable to OAHP, but only have the ability to **read** the data the PAE entered. The same holds true in reverse for the PAE User, i.e., PAEs may only **read** OAHP fields, but not enter or update them.

The following Mortgage Restructuring, Rent Reduction Only, and Comparability Review critical date fields are system-generated and therefore cannot be edited by Users: **Original Section 8 Expiration Date (Post MAHRA)**, **Current Section 8 Expiration Date**, **Field Office Receives Intent to Renew from Owner**, **Field Office Receives Request for Rent Reduction from Owner**, **Field Office Refers to OAHP**, **OAHP Sends List of Potential Assets**, **Complete Comp Review Due (per PRA)**, and **Number of Resubmissions**.

Comments relative to tasks/dates may be recorded in the M2M system and are encouraged. Click on the “**C**” button next to a critical date to enter comments (in a pop-up box) related to a specific date or phase. Figure 7-9, **Comment Fields** is an excerpt of a **Mortgage Restructuring Critical Dates Tracking** screen with highlighted comment boxes.

Phase: Data Collection/Due Diligence

Data Collection:

PAE and Owner Have Kickoff Meeting:	11/11/2000	C *
PCA Assigned by PAE:	05/04/2000	C *
Appraisal Assigned by PAE:	05/05/2000	C *
Tenant Meeting - #1:	05/05/2000	C *
Owner Submits Data Collection Report:	06/03/2000	C *

Figure 7-9, Comment Fields

On the **Mortgage Restructuring Critical Dates Tracking** screen (only) there is a yellow timeline that shows at a glance, the guidelines for completing phases and tasks (in accordance to the timeframes in the M2M Operating Procedures Guide).

All dates must be entered in the **MM/DD/YYYY** format. The **Save** button must be selected once the updates or changes are verified.

7.3.4 Critical Dates Reporting

Data entered in the Critical Dates Tracking module is used to generate the following reports:

- ◆ Assigned Active Property Report
- ◆ Submitted Plans Awaiting Decision Report
- ◆ Property Status Report
- ◆ Overview of the Portfolio Status Report
- ◆ Partial Assignments Report
- ◆ Rent Comparability Review Progress Report
- ◆ Rent Reduction Only Progress Report
- ◆ Mortgage Restructuring Progress Report

♪ **Note:** Careful attention to detail must be paid when entering dates on the Critical Dates Tracking screen. Updates are made to the system's database once the User saves the changes. It is **strongly suggested** you review the data for accuracy before **and** after selecting the Save button.

A message is displayed confirming changes were saved if the data was entered in the correct format.

There are additional comment buttons at the bottom of the screen for use by the PAE and OAHP Users, respectively.

If an action other than a closing occurred on a Mortgage Restructuring contract, there is a date and comment box available at the bottom of the screen. There are also radio button options below this date that should be selected.

Date Action Other than Closing Occurred:	<input type="text"/>	<input type="button" value="C"/>
--	----------------------	----------------------------------

♪ **Note:** Remember to save any and all changes or updates before leaving this screen by selecting the Save button at the bottom of the screen.

7.3.5 Ending M2M Contract Process

After a contract has completed the M2M process, OAHP may close it by clicking the End M2M Process button at the bottom of the screen. A confirmation window, as illustrated below as Figure 7-10, End M2M Process Confirmation Window, will be displayed. Select **OK** to end the contract or **Cancel** to return to the previous screen.

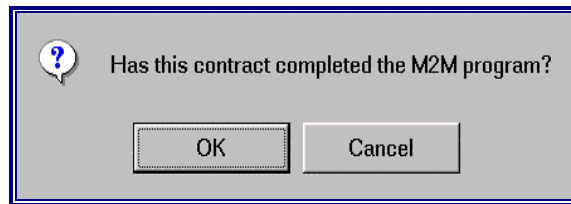


Figure 7-10, End M2M Process Confirmation Window

7.3.6 Changing Contract Renewal Type

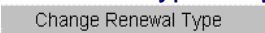
During the M2M Program process, a contract's renewal type may be changed by selecting the **Change Renewal Type** button  resulting in the Figure 7-11, Contract Renewal Type Change, screen (shown below).

Figure 7-11, Contract Renewal Type Change

The **current** renewal type is displayed and a drop-down box is available to select the new renewal type for the contract. The User is also required to enter the date the contract's renewal type changed. Comments relating to the contract's changed status may also be entered.

After the user clicks the **Continue** button, a confirmation screen is displayed to let the user know the change was accepted. Changing the renewal type for a contract will generate a history record of the action. Clicking the **Continue** button will return a Critical Dates Tracking screen, based on the **new** renewal type.

7.3.7 As Is Rents Screen

If a 'Date Action Other than Closing Occurred' is entered and saved, an 'As Is Rents' button will appear near the bottom of the screen. Clicking the 'As Is Rents' button will display a screen for entering as is rent information as shown below in Figure 7-12, As Is Rents Screen.

Click here to enter/update the As Is Rents.

Mortgage Restructuring As Is Rents

HEREMS Property ID: 800000455

Primary FHA Number: 06244054

Contract Number: AL09M000044

Property Name: TALLADEGA DOWNS

PAE Name: Jefferson County Assisted Housing Corp.

PAE Recommendation: Project Based Assistance Required

Bedroom Type	# of Units (REMS)	As Is Rents
0		<input style="width: 100%;" type="text"/>
1	16	<input style="width: 100%;" type="text" value="427.00"/>
2	38	<input style="width: 100%;" type="text" value="587.95"/>
3	46	<input style="width: 100%;" type="text" value="1,124.25"/>
4		<input style="width: 100%;" type="text"/>
5		<input style="width: 100%;" type="text"/>
6		<input style="width: 100%;" type="text"/>
7		<input style="width: 100%;" type="text"/>

Figure 7-12, As Is Rents Screen

The 'PAE Recommendation' with drop down selection box for options 'Project Based Assistance' and 'Tenant Based Assistance' is required to be selected.

Input data fields allow the user to enter an 'As Is Rent' amount for each unit type.

7.3.8 Comp Review Results Screen

Clicking the 'Comp Review Results' button that is displayed on a Comp Review type contract, will display a screen for entering Comp Review Results information as shown below in Figure 7-13, Comp Review Results Screen.

Approved Review Results:

☐ Review in Process

☐ Section 8 Contract Rent Over Market

☒ Section 8 Contract Rent Equal/Under Market

Comp Review Results

Click to enter / update comp review results.

Home Back Log Off

Comp Review Results

HEREMS Property ID: 800001447

Primary FHA Number: 12135056

Contract Number: CA39M000158

Property Name: EL CASA VERDE I

PAE Name: Heskin Signet Partnership

Bedroom Type	# of Units (REMS)	Current Contract Rents	Owner's Submitted Rents	Determined Market Rents
0	16	<input type="text"/>	<input type="text"/>	<input type="text"/>
1	24	<input type="text"/>	<input type="text"/>	<input type="text"/>
2	48	<input type="text"/>	<input type="text"/>	<input type="text"/>
3	22	<input type="text"/>	<input type="text"/>	<input type="text"/>
4		<input type="text"/>	<input type="text"/>	<input type="text"/>
5		<input type="text"/>	<input type="text"/>	<input type="text"/>
6		<input type="text"/>	<input type="text"/>	<input type="text"/>
7		<input type="text"/>	<input type="text"/>	<input type="text"/>

Cancel Clear Save

Figure 7-13, Comp Review Results Screen

Input data fields allow the user to enter the Current Rent, Owner's Submitted Rent, and Determined Market Rent amounts for each unit type.

7.3.9 Comp Review to Determine Mark-Up-To-Market Eligibility Screen

Clicking the 'Comp Review Results' button that is displayed on a Post M2M Comp Review type contract, will display a screen for entering Comp Review to Determine Mark-Up-To-Market Eligibility information as shown below in Figure 7-14, Comp Review To Determine Mark-Up-To-Market Eligibility Screen.

☐ Review in Process

Approved Review Results:

☐ Section 8 Contract Rent Over Market
☒ Section 8 Contract Rent Equal/Under Market

Comp Review Results

Click to enter / update comp review results.

[Home](#)
[Back](#)
[Log Off](#)

Comp Review to Determine Mark-Up-To-Market Eligibility

HEREMS Property ID: 800000416

Primary FHA Number: 06235325

Contract Number: AL09M000025

Property Name: ROCKWOOD APARTMENTS

PAE Name: Marion County Housing Authority

Bedroom Type	# of Units (REMS)	Current Contract Rents	Owner's Submitted Rents	Determined Market Rents
0		<input type="text"/>	<input type="text"/>	<input type="text"/>
1	16	<input type="text" value="345.00"/>	<input type="text" value="425.00"/>	<input type="text" value="395.00"/>
2	48	<input type="text"/>	<input type="text"/>	<input type="text"/>
3	24	<input type="text"/>	<input type="text"/>	<input type="text"/>
4		<input type="text"/>	<input type="text"/>	<input type="text"/>
5		<input type="text"/>	<input type="text"/>	<input type="text"/>
6		<input type="text"/>	<input type="text"/>	<input type="text"/>
7		<input type="text"/>	<input type="text"/>	<input type="text"/>

Figure 7-14, Comp Review To Determine Mark-Up-To-Market Eligibility Screen

Input data fields allow the user to enter the Current Rent, Owner's Submitted Rent, and Determined Market Rent amounts for each unit type.

8 RESTRUCTURING PLANS MODULE

The Restructuring Plans module is accessed by selecting the **Restructuring Plans** button from M2M's home screen. There are also links at the bottom of the **Mortgage Restructuring** and **Rent Reduction Only Critical Dates Tracking** screens to the associated property's restructuring plan form.

Note: These restructuring plan forms are only one part of the Draft Restructuring Plans and Subsidy Recommendations that must be submitted to OAHP for approval.

Within this module are **Restructuring Plan Forms** that must be submitted and approved via M2M. Each type of restructuring plan form (**Form 5.2** and **Form 10.2**) has its own menu selections, specific to the data that must be collected to generate a form. Additional detail may be found in **Section 8.2 Mortgage Restructuring Plan Forms** and **Section 8.3 Rent Reduction Only Plan Forms**, respectively.

Figure 8-1, Restructuring Plans Screen, represents the screen that will be retrieved when the Restructuring Plans button is clicked. The button may be found on M2M's home page and on the menu bar within other modules.

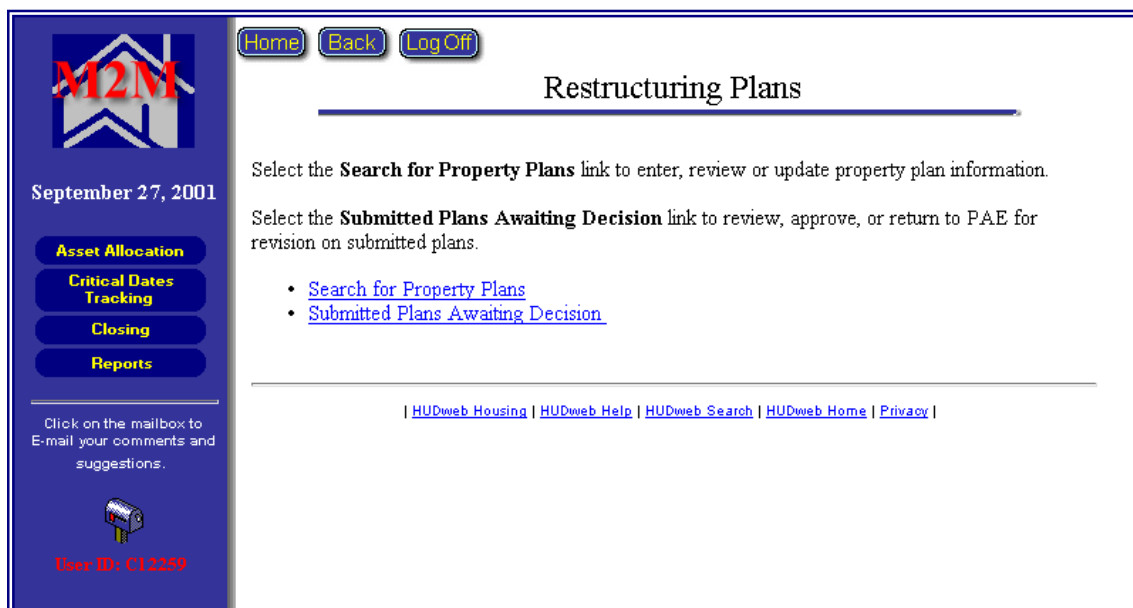


Figure 8-1, Restructuring Plans Screen

Users may search for **Restructuring Plans** by clicking the **Search for Property Plans** link or retrieve submitted plans by clicking the **Review Submitted Plans Awaiting Decision** link. Clicking the **Search for Property Plans** link retrieves a search selection criteria page, as shown below in Figure 8-2, Restructuring Plans Search Criteria Screen.

Home Back Secure Systems Log Off

Select Search Criteria for Restructuring Plans

Select one of the following criteria:

REMS ID: FHA #:

Or select one or more of the following options:

Preservation Office:

State:

PAE:

Property:

Plan Status: Date of Selected Plan Status:

Renewal Type:

Continue Clear

Or click [HERE](#) to get ALL Restructuring Plans.

[HUDweb Housing](#) | [HUDweb Help](#) | [HUDweb Search](#) | [HUDweb Home](#) | [Privacy](#)

Figure 8-2, Restructuring Plans Search Criteria Screen

Select one of the following criteria available to retrieve properties for the Restructuring Plans:

- ◆ Enter a REMS ID for a specify property
- ◆ Enter a FHA Number for a specific property

Or select one or more of the following options available to retrieve properties for the Restructuring Plans:

- ◆ Select an **OAHP Region** from the drop-down list
- ◆ Select a **State** from the drop-down list
- ◆ Select a **PAE Name** from the drop-down list
- ◆ Enter a **Property's Name**
- ◆ Select a **Restructuring Plan Status** from the drop-down list
- ◆ Select a **Date of Selected Plan Status** from drop-down list
- ◆ Select a **Renewal Type** (Mortgage Restructuring or Rent Reduction Only)
- ◆ Click the underlined [HERE](#) link to retrieve all restructuring plans in the system

8.1 Restructuring Plans General Information

Figure 8-3, Restructuring Plans Property Selection Screen, represents the results from the **Restructuring Plans Search Criteria** based on a **state** criterion search.

[Home](#)
[Back](#)
[Log Off](#)

Assigned Properties

The following 3 out of 3 properties met your **Mortgage Restructuring, OMHAR Transaction Center search criteria.**

To view/update a contract's restructuring plan, click its underlined **Contract Number**.

Note:

- * You will only be able to update or save data for plans with a **Not Submitted** or **Returned for Revision** Approval Status.
- * Properties that have **Comp Review** or **Opt Out** as a renewal option are not displayed, since there are no restructuring plans for these renewal types.

PAE Name	Status	Approval Status	Property Name	Model Uploaded	Sec 8 Contract Number	Sec 8 Contract Renewal Type	Expiration Date	Property City	State
Indiana Housing Finance Authority	A	Not Submitted	Summerchase Apartments	C	AR37L000081	Mortgage Restructuring	06/30/1999	Van Buren	AR
Indiana Housing Finance Authority	A	Not Submitted	BARBOUR GARDEN APARTMENTS	C	CT26E000010	Mortgage Restructuring	04/25/2000	HARTFORD	CT
VENCOR, INC.	A	Approved	WINDSOR PLACE	C	OH16H051005	Mortgage Restructuring	10/13/1999	LANCASTER	OH

[HUDweb Housing](#) |
 [HUDweb Help](#) |
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Figure 8-3, Restructuring Plans Property Selection Screen

OAHP users can view properties and associated data entered by the PAEs on the property by clicking an underlined contract number link to access the Restructuring Plans section. If a property has completed the M2M process, it is “**completed**” (as indicated by a “**C**” in the **Contract Status** column) and the User will only be allowed to **view** or **print** the restructuring plan form.

8.1.1 Negative Data Entry Fields

Within the Restructuring Plans module, there are fields that have **red negative number indicators** outside their data entry boxes (e.g., as represented below in the **Residential Bad Debt** and **Residential Vacancy** fields shown in Figure 8-4, Negative Field Indicators). Users are instructed to enter **positive** numbers in these fields, as the system is programmed to **subtract** these values in calculations, where applicable.

Residential Bad Debt	-	<input type="text"/>
Residential Vacancy	-	<input type="text"/>

Figure 8-4, Negative Field Indicators

8.1.2 Navigating the Restructuring Plans Sections

Users may quickly “jump” to another section within the Restructuring Plans module by clicking one of the buttons on the menu bar located on the left side of the screen. It is important to know that the User should save before jumping to a different page in order to keep the data entered. Clicking the **Critical Dates Tracking** button will take the User to the Critical Dates Tracking form for the current property. In addition, the User may print a hardcopy of the restructuring plan form, by clicking the **Printable Form** button at any time. Figure 8-5, Restructuring Plan Menu Bar, shows an example of the Restructuring Plans menu bar.



Figure 8-5, Restructuring Plan Menu Bar

8.2 Mortgage Restructuring Plan Forms

The following sections provide information on the data required to complete and submit the Form 5.2 Mortgage Restructuring. The user may opt to upload and populate the form with data extracted from the Excel Underwriting Model or key the data manually. Figure 8-6, Form 5.2 Mortgage Restructuring provides an

example of the Mortgage Restructuring main screen with subdivisions for the model functions and the online form.

M2M

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Restructuring Plans

Form 5.2 Mortgage Restructuring

Property ID: 800000000 **FHA Number:** 17635014

Property Name: OMHAR Property

PAE Name: Test PAE

Excel Underwriting Model v4

- [Instructions for uploading the Model v4 and the Model data](#)
- [Upload extracted data into the online Form 5.2](#)
- [Upload a copy of the Model for centralized storage](#)
- [Open or Download Model](#)

Online Form 5.2

- [Property & Loan Information Term Sheet](#)
- [Property Operating Statement](#)
- [Debt Restructuring](#)
- [Sources and Uses](#)
- [Print the Entire Form 5.2](#)

[HUDweb Housing](#) | [HUDweb Help](#) | [HUDweb Search](#) | [HUDweb Home](#) | [Privacy](#) |

Figure 8-6, Form 5.2 Mortgage Restructuring

Also, let it be noted, that the PAE is responsible for entering the data and selecting the “submit” button to lock the data and notify OAHP of the submission. Also, the PAE must mail in the full submission documentation and place a copy of the Underwriting Model on the centralized server. OAHP is responsible for approving or returning for revision the submitted documentation.

8.2.1 Excel Underwriting Model v4

The following subsections provide detailed instructions showing how to upload the Extract data and Model to the M2M System:

- ◆ [Instructions for uploading the Model v4 and the Model data](#)
- ◆ [Upload extracted data into the online Form 5.2](#)
- ◆ [Upload a copy of the Model for centralized storage](#)
- ◆ [Open or Download Model](#)

8.2.1.1 Instructions for uploading the Model v4 and the Model data

The [Instructions for uploading the Model v4 and the Model data](#) (shown on the next page as Figure, 8-7, How to Upload Extract and Model screen) contains

general and detailed information of the process to upload extracted data and the model to the M2M system for Form 5.2:

PrintClose

How to Upload Extract and Model to M2M System

The M2M system has been upgraded to allow for PAEs to

- upload data from the M2M Excel Underwriting Model v4 automatically, (without having to perform data entry into the M2M Form 5.2). This new feature only works with the **version 4** of the model. Also,
- the M2M Excel Underwriting model being submitted for review and approval must be uploaded and saved on this centralized, protected server.

Steps to Perform the Two Tasks:

To prepare the Model for uploading into the M2M system Form 5.2 online:

- Complete the data entry in the Underwriting Model v4 and save as the name - REMS Property Id.xls or .xlsm (e.g., 8000000000.xls). It is very important to note the location where the model is saved and the REMS #.
- Go to the Worksheet Tab in the model named: "Create MIS Upload Worksheet."
- Click on the Button "Create Extract File."
- An "extract" file is created automatically and saved in the SAME folder or location as the current Model.
- The extract file is automatically named the REMS property id.txt (e.g., 8000000000.txt).
- Print a copy of the worksheet called "Form 5.2 Data" – to use in the validation of the uploaded data.

To Upload the Extracted Data in order to populate the Form 5.2 online:

- Log into the M2M system and go to the Restructuring Plans Module.
- Search for the property associated with the model to be uploaded.
- Select the property.
- From the Restructuring Plans screen, select the option: Upload extracted data into the online Form 5.2
- Either type in the path or location of the extract file (txt file) or click on Browse to find it on the workstation. (It will be in the same folder as the model).
- Click on the button "Upload the File."
 - If the filename or type of file is incorrect there will be an error displayed.
 - If the filename matches the REMS property id and is the correct file, the data will be extracted and populate the Form 5.2 automatically.
- First, a screen with data will appear. The PAE should review the data by comparing the printout from the Model "Form 5.2 Data" worksheet.
- Click on Save if the data is valid.
- If there were errors in the data and the PAE doesn't want to save the data into the system, cancel by clicking the Back button.
- If there were errors, review the model and make corrections in the model. Save the corrections and start over by creating a new extract file as described above.

To upload and save a copy of the M2M Excel Underwriting Model on the centralized server:

- Go to the Restructuring Plans Module in M2M system.
- Select the property.
- From the Restructuring Plans screen select the option: Upload a copy of the Model for centralized storage
- Either type in the path or location of the Model (excel) file or click on Browse to find it on the workstation.
- Click on the Button "Upload the File."
- An error will display if there are problems, otherwise, click on Continue.
- The model is now saved on the server.
- If the PAE is ready to submit the restructuring plan to OAHP, click on Submit after uploading the model and extracted data to the M2M system.

For the PAE or OAHP to view or download to a workstation:

- Go to the Restructuring plans screen.
- Select the Property.
- Select the option: Open or Download Model
- If there is an error, it is most likely that the browser is not set up to view Excel and ".xls" needs to be added to the browser's list of applications.
- Otherwise, choose "save" or "open" – depending on your need.

Figure 8-7, How to Upload Extract and Model Screen

8.2.1.2 Upload extracted data into the online Form 5.2

The **Upload extracted data into the online Form 5.2** (shown as Figure, 8-8, Form 5.2 Upload Screen) contains general and detailed information on how to upload extracted data into the online Form 5.2:

Figure 8-8, Form 5.2 Upload Screen

8.2.1.3 Upload a copy of the Model for centralized storage

The Upload a copy of the Model for centralized storage (shown on the next page as Figure, 8-9, Excel Underwriting Model Upload Screen) contains general and detailed information on how to upload the Excel underwriting model:

Figure 8-9, Excel Underwriting Model Screen

8.2.1.4 Open or Download Model

The Open or Download Model function allows users to view or download the Excel Model that has been placed on the centralized server.

8.2.2 Online Form 5.2

The following subsections provide additional information on the data that is required to populate and generate the Form 5.2 Mortgage Restructuring Plan:

- ◆ Property & Loan Information Term Sheet
- ◆ Property Operating Statement
- ◆ Debt Restructuring
- ◆ Sources and Uses
- ◆ Print the Entire Form 5.2
- ◆ Submit a Decision for Restructuring Plan (for Pending properties only)

8.2.2.1 Form 5.2 Property & Loan Information Term Sheet

The **Property & Loan Information Term Sheet** (an example of which is on the next page as Figure, 8-10, Property & Loan Information Term Sheet) contains general and detailed information about the property, e.g., physical location, number of units, current Unpaid Principal Balance (UPB), etc., and consists of the following subsections:

- ◆ General Information
- ◆ Pre-Restructuring Loan Information
- ◆ Property Information
- ◆ Section 8 Contract Information
- ◆ Mark-to-Market Rents

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[Secure Systems](#)
[Log Off](#)

Form 5.2

Property & Loan Information

General Information

Property ID: 800000220
 FHA Number: 06244018
 FHA Program Type: 236(0)(1)
 Property Name: DANYA PARK GDNS
 Property Address: 113 DANYA COURT
 City: PRATTVILLE
 State: ALABAMA
 PAF Name: Jefferson County Assisted Housing Corp.
 HUD Project Manager: PAT ALLEN FOREST PITTS
 Owner:
 Owner Contact: HUGH V. SMITH
 Management Company:
 Identity of Interest: No If incorrect, please correct here.
 Year Built: 1981
 Year of Last Rehab:

Pre-Restructuring Loan Information

	REMS	PAF Entry or Corrections
Original Loan Amount:	471,400.00	1,590,000.00
Annual Debt Service (Without MIP):	37,225.80	133,988.00
Annual Debt Service (With MIP):		140,810.00
Interest Rate (%):	7.5000	7.4000
Original Term (In Years):	40.00	
Maturity Date:	09/01/2013	03/01/2022
Prepayment Penalty (%):		
UPB as of 08/27/2003 :	324,238.59	1,355,879.00

Property Information

	REMS (Pre)	PAF Entry or Corrections (Pre)	Post Restructuring
Total Units:	40	50	50
# Non-Revenue Units:			
# of Sect. 8 Assisted Units:	0	50	50
# of Unassisted Units:	40		
Current Physical Vacancy (%) (Apts Only):	3.0		
Rural, Suburban or Urban:	Urban		
Elderly/Family:	Family	Family	
Appraisal Date:	07/26/2001		
Appraised Value:	1,243,000.00		
New Assisted:	No		

Section 8 Contract Information

Contract #	Expiration Date	Current Contract Status	Unit Type	# of Units	Contract Rents	Which Contract Is Being Renewed?	Is this Contract Being Combined?
AL120MR2345		Inactive			\$0.00	<input type="radio"/>	N/A

Mark-to-Market Rents Approved Rent Appeal?

Prior to Submission to OAHP, PAF needs to determine the following:

Use of Exception Rents? *

PAF Recommendation:

* Changing the value of this field will save all your current data and redisplay the screen with additional fields for Exception Rents or remove them if not needed.

Redesign Type	# of Pre Restructuring Contract Units (REMS)	# of Pre Restructuring Contract Units (Exception)	Pre Restructuring Average Monthly Contract Rents	# of Post Restructuring Contract Units	Post Restructuring Monthly Market Rents	Post Restructuring Monthly Exception Rents	FMR	System Generated Exception/FMR
0							343.00	
1	0	8	565.00	8	425.00	432.00	457.00	0.9453
2	0	36	658.00	36	510.00	519.00	599.00	0.8664
3	0	6	704.00	6	580.00	590.00	749.00	0.7877
4							841.00	
5							967.00	
6							1,093.00	
7							1,219.00	

Use Weighted Average for Units Included in Mark-to-Market Only

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Figure 8-10, Property & Loan Information Term Sheet

8.2.2.2 Form 5.2 Property Operating Statement

The **Property Operating Statement** contains pre- and post-restructuring revenue and expense financial data (REMS read-only displays, PAE User entries, or system-calculated). The Property Operating Statement (an example of which is on the next page as Figure, 8-11, Property Operating Statement) consists of the following subsections:

- ◆ Annual Revenue
- ◆ Annual Expenses
- ◆ Net Operating Income (including Adjusted NOI and DSCR)

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Form 5.2

Property Operating Statement

General Information

Property ID: 800000000
FHA Number: 00035194
Property Name: OMHAR Property
PAE Name: Test PAE

Annual Revenue	Comments	Pre-Restructuring As of FY ending 12/31/2000			Post-Restructuring As of 10/01/2003			System-Generated Difference		
		Project Total	/Unit /Annum	/Unit /Month	Project Total	/Unit /Annum	/Unit /Month	Project Total	/Unit /Annum	/Unit /Month
Gross Residential Income (Ofon-Section 8 Project Based Units)										
Gross Residential Income (Section 8 Project Based Units)		255,190.00	5,547.61	462.30	219,840.00	4,779.13	398.26	35,350.00	768.48	64.04
Commercial										
Other		4,182.00			2,900.00			1,282.00		
Gross Potential Income		259,372.00	5,638.52	469.88	222,740.00	4,842.17	403.51	36,632.00	796.35	66.36
Residential Vacancy										
Pre(2.6)% Post(5.0)%		-6,595.00			-10,992.00			-4,397.00		
Residential Bad Debt										
Pre()% Post(0.0)%		-			-4397.00			-		
Commercial Vacancy										
Pre()% Post()%		-			-			-		
Commercial Bad Debt										
Pre()% Post()%		-			-			-		
Effective Gross Income		252,777.00	5,495.15	457.93	207,351.00	4,507.63	375.64	45,426.00	987.52	82.29

Annual Expenses	Comments	Pre-Restructuring As of FY ending 12/31/2000			Post-Restructuring As of 10/01/2003			System-Generated Difference		
		Project Total	/Unit /Annum	/Unit /Month	Project Total	/Unit /Annum	/Unit /Month	Project Total	/Unit /Annum	/Unit /Month
Base										
Real Estate Taxes		10,053.00	218.54	18.21	10,882.00	236.57	19.71	-829.00	-18.03	-1.50
Insurance		10,043.00	218.33	18.19	13,500.00	293.48	24.46	-3,457.00	-75.15	-6.26
Utilities		17,870.00	388.48	32.37	20,000.00	434.78	36.23	-2,130.00	-46.30	-3.86
Base Total		37,966.00	825.35	68.78	44,382.00	964.83	80.40	-6,416.00	-139.48	-11.62
Controllable										
Management Fees										
Pre(7.9)% Post(9.6)%		19,920.00	433.04	36.09	20,000.00	434.78	36.23	-80.00	-1.74	-1.14
Salaries and Benefits		44,767.00	973.20	81.10	48,628.00	1,057.13	88.09	-3,861.00	-83.93	-6.99
Other Administrative		13,320.00	289.57	24.13	12,431.00	270.24	22.52	889.00	19.33	1.61
Section 8 Administrative										
Repairs and Maintenance		23,605.00	513.15	42.76	21,500.00	467.39	38.95	2,105.00	45.76	3.81
Other Controllable										
Controllable Total		101,612.00	2,208.96	184.08	102,559.00	2,229.54	185.80	-947.00	-20.58	-1.71
Other										
Security										
Neighborhood Network										
Capital Recovery Payment(CRP)					13,263.00	288.33	24.03	-13,263.00	-288.33	-24.03
Other Total		0.00	0.00	0.00	13,263.00	288.33	24.03	-13,263.00	-288.33	-24.03
Total Expenses		139,578.00	3,034.30	252.86	160,204.00	3,482.70	290.22	-20,626.00	-448.40	-37.37

Net Income	Comments	Pre-Restructuring As of FY ending 12/31/2000			Post-Restructuring As of 10/01/2003			System-Generated Difference		
		Project Total	/Unit /Annum	/Unit /Month	Project Total	/Unit /Annum	/Unit /Month	Project Total	/Unit /Annum	/Unit /Month
Net Operating Income		113,199.00	2,460.85	205.07	47,147.00	1,024.93	85.41	66,052.00	1,435.92	119.66
Reserve for Replacement Contributions		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Adjusted Net Operating Income		113,199.00	2,460.85	205.07	47,147.00	1,024.93	85.41	66,052.00	1,435.92	119.66
Annual Debt Payments										
1 st Mortgage Annual Debt Service *		\$117,955.00	\$2,564.24	\$213.69	\$18,226.00	\$396.22	\$33.02	\$99,729.00	\$2,168.02	\$180.67
IRP Applied to Debt Service		-			-			-		
Total Amount of 1 st Mortgage Debt Service Less IRP		117,955.00	2,564.24	213.69	18,226.00	396.22	33.02	99,729.00	2,168.02	180.67
Gross Cash Flow (After Debt Service)		-4,756.00	-103.39	-8.62	28,921.00	628.72	52.39	-33,677.00	-732.11	-61.01
Incentive Performance Fee (IPF)					-6,484.00	140.96	11.75	-6,484.00	-140.96	-11.75
Surplus Cash		-4,756.00	-103.39	-8.62	22,437.00	487.76	40.65	-27,193.00	-591.15	-49.26
Post Restructuring 2 nd Mortgage										
Enter the Post Restructuring 2 nd Mortgage Surplus Cash Flow Split Percentage					100.0	%				
System Generated Post Restructuring 2 nd Mortgage Surplus Cash Flow Payment					22,437.00	\$				
Debt Service Coverage Ratio (1 st Mortgage Debt)					2.59					

* Value for Pre-Restructuring is from the Property and Loan Information Page's Annual Debt Service with MIP
* Value for Post-Restructuring is from the Debt Restructuring Page's 1st Mortgage Annual Debt Service with MIP

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Figure, 8-11, Property Operating Statement

8.2.2.3 Form 5.2 Debt Restructuring

The **Debt Restructuring** screen consists of the pre- and post-restructuring financial data and terms for the restructured mortgage(s), e.g., originator, original loan amount, interest rate, etc. The following is an excerpt of the Debt Restructuring screen for the **First Mortgage** (Figure 8-12, Debt Restructuring).

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Form 5.2 Debt Restructuring (Annual)

Property ID: 800000000
Primary FHA Number: 00035194
Property Name: OMHAR Property
PAE Name: Test PAE

Remember to save all changes or updates by clicking **Save** button on the left.

If there was existing FHA or HUD Held subordinate debt before restructuring that will remain after restructuring, click here to enter the PRE and Post-Restructuring loan terms. Subordinate Debt

Debt Restructuring (Annual)	Pre Restructuring	Post Restructuring
First Mortgage (Take out or Modified Loan)		
Note: Leave blank if no refinancing or no modification to existing debt.		
New FHA Number		<input type="text" value="17635040"/>
Originator		<input type="text"/>
Loan Type	<input type="text"/>	<input type="text"/>
FHA Program Type	223(a)(7)/221(d)(4)M	<input type="text" value="223(a)7"/>
Original Loan Amount	3,168,400.00	<input type="text" value="1,865,498.00"/>
UPB as of 04/19/2001	3,114,688.00	
Annual Debt Service (Without MIP)	253,260.00	<input type="text" value="151,468.00"/>
Annual Debt Service (With MIP)	<input type="text" value="269,102.00"/>	<input type="text" value="160,795.00"/>
Loan Terms:		
Interest Rate (%)	7.6250	<input type="text" value="8.2500"/>
Original Term (Months)	348	<input type="text" value="480"/>
Remaining Amortization Period (Months)	<input type="text" value="356"/>	<input type="text"/>
Maturity Date	10/01/2030	<input type="text"/>
Prepayment Penalty (%)		
Lockout Date	<input type="text"/>	
Appraised LTV (%)		<input type="text" value="50.76"/>

Figure 8-12, Debt Restructuring

8.2.2.4 Form 5.2 Sources and Uses

The Sources and Uses section is a data entry screen for OAHP HQ, OAHP RO, and PAE Users to record a summation of the property funding and the anticipated distribution of those funds. Figure 8-13, Sources and Uses, is an example of the Sources and Uses screen.

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Form 5.2
Sources and Uses

Property ID: 800000220
Primary FHA Number: 06244018
Property Name: DANYA PARK GDNS
PAE Name: Jefferson County Assisted Housing Corp.

Remember to save all changes or updates by clicking the **Save** button on the left.

Sources	Amount	Fund Uses	Amount
DEBT:			
Restructured 1st Mortgage Principal:	<input type="text" value="263,000.00"/>	Partial Payment of Existing Loan (if Modifying):	<input type="text"/>
Mortgage Restructuring Payment:	<input type="text" value="1,336,543.00"/>	Payoff Existing 1st Mortgage Loan (if Refinancing):	<input type="text" value="1,355,878.81"/>
EXISTING ACCOUNT BALANCES:			
Reserve for Replacement:	<input type="text" value="116,053.47"/>		
Residual Receipts:	<input type="text"/>	Other OAHP Approved Transaction Costs*:	<input type="text" value="40,363.90"/>
Existing Tax Escrow:	<input type="text" value="21,761.38"/>		
Existing Hazard Insurance:	<input type="text"/>		
Surplus Cash Account/Other Escrow:	<input type="text"/>	Owner's Share of Surplus Reserves:	<input type="text"/>
236 Rehab Grants:	<input type="text"/>		
OWNER'S CONTRIBUTION TOWARD:		ESCROWS:	
Rehabilitation Escrow:	<input type="text" value="13,337.63"/>	OAHP Approved Rehabilitation Costs:	<input type="text" value="66,688.17"/>
IDRR (If Greater Than Existing Reserve Balance):	<input type="text"/>	Initial Deposits to Replacement Reserves (IDRR):	<input type="text" value="263,500.00"/>
Other Transaction Costs:	<input type="text" value="8,640.00"/>	Tax Escrow:	<input type="text" value="23,793.60"/>
		Hazard Insurance Escrow:	<input type="text" value="9,111.00"/>
Repair Loan or Grant:	<input type="text"/>		
OTHER FUND SOURCES:		OTHER FUND USES:	
Debt Service Reserve 1:	<input type="text"/>	Tax Escrow Offset:	<input type="text" value="2,032.22"/>
2:	<input type="text"/>	Insurance Escrow Offset:	<input type="text" value="9,111.00"/>
3:	<input type="text"/>	Shortfall in Note Payoff:	<input type="text"/>
	<input type="text"/>	D:	<input type="text"/>
Other Sources Needed to Balance:	<input type="text"/>	Additional Recovery to HUD:	<input type="text"/>
Total Sources of Funds:		Total Uses of Funds:	
	<input type="text" value="1,759,335.48"/>		<input type="text" value="1,770,478.70"/>
<input type="button" value="Sources Comments"/>		<input type="button" value="Uses Comments"/>	

* Subtotal of all transaction costs less the tax and hazard insurance escrow increases. This avoids counting the increases twice, as they will already be reflected in the tax and hazard insurance escrows in the uses.

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Figure 8-13, Sources and Uses

8.2.2.5 Print Entire Form

The Print Entire Form option requires several steps to print each of the pages. Each screen is printed using the browser's print button, one screen at a time.

8.2.2.6 Submit a Decision for Restructuring Plan

The Submit a Decision for Restructuring Plan option will only be present for properties that are in the Pending Status. The user can select their decision from the drop down box and the name, e-mail address, and date must be entered. The PAE will be notified via e-mail of the decision. Figure 8-14, Review of PAE Plan Submissions, show below, is a sample of the screen.

State	Property Name	Property	Renewal Type	Date Submitted	OAHP Decision	Comments
FL	CARVER GARDENS	800003978	Mortgage Restructuring	05/31/2001	Decision Pending	<input type="button" value="PAE"/> <input type="button" value="OAHP *"/> <input type="button" value="TRANS"/>

Figure 8-14, Review of PAE Plan Submissions

8.3 Rent Reduction Only Plan Forms

The following subsections provide additional information on the data relative to **10.2 Rent Reduction Only Restructuring Plan Forms**. Figure 8-15, Form 10.2 Rent Reduction Only, provides an example of the Rent Reduction Only Restructuring Plans main screen. It contains links to the following three major categories of data used to populate a property's Rent Reduction Only Restructuring Plan Form 10.2 as well as a print option and a submit decision option.

- ◆ **Property & Loan Information Term Sheet**
- ◆ **Property Operating Statement**
- ◆ **Refinancing Sheet**
- ◆ **Print the Entire Form**
- ◆ **Submit a Decision for Restructuring Plan** (Pending properties only)


The screenshot shows the M2M Restructuring Plans interface for Form 10.2 Rent Reduction Only. On the left is a blue sidebar with the M2M logo, the date September 28, 2001, and a list of navigation links: Asset Allocation, Critical Dates Tracking, Closing, and Reports. Below these links is a mailbox icon and the text 'Click on the mailbox to E-mail your comments and suggestions.' At the bottom of the sidebar is a 'User ID: C12259' label. The main content area has a top navigation bar with 'Home', 'Back', and 'Log Off' buttons. The title 'Restructuring Plans' is centered, with 'Form 10.2 Rent Reduction Only' below it. The main content displays property information: Property ID: 800016766, FHA Number: 04335192, Property Name: JEFFREY PLACE, and PAE Name: Ohio Housing Finance Agency. Below this is a bulleted list of links: Property & Loan Information Term Sheet, Property Operating Statement, Refinancing Sheet, Print the Entire Form 10.2, and Submit a Decision for Restructuring Plan. At the bottom of the main content area is a footer with links: HUDweb Housing, HUDweb Help, HUDweb Search, HUDweb Home, and Privacy.

M2M

September 28, 2001

[Asset Allocation](#)
[Critical Dates Tracking](#)
[Closing](#)
[Reports](#)

Click on the mailbox to
E-mail your comments and
suggestions.


User ID: C12259

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Restructuring Plans

Form 10.2 Rent Reduction Only

Property ID: 800016766 **FHA Number:** 04335192
Property Name: JEFFREY PLACE
PAE Name: Ohio Housing Finance Agency

- [Property & Loan Information Term Sheet](#)
- [Property Operating Statement](#)
- [Refinancing Sheet](#)
- [Print the Entire Form 10.2](#)
- [Submit a Decision for Restructuring Plan](#)

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Figure 8-15, Form 10.2 Rent Reduction Only

8.3.1 Form 10.2 Property & Loan Information Term Sheet

The **Property & Loan Information Term Sheet's** contents were covered in Section 8.2.2.1, Form 5.2 Property & Loan Information Term Sheet; however, it is important to note that there are some differences between the Form 5.2 and Form 10.2 Property & Loan Information Term Sheet.

8.3.2 Form 10.2 Property Operating Statement

Refer to Section 8.2.2.3, Property Operating Statement to note the content of this screen. Again, there are some fields in Form 5.2 that are not in the Rent Reduction Only form. The Property Operating Statement in Form 10.2 (an example of which is on the next page as Figure, 8-16, Form 10.2 Property Operating Statement)

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Form 10.2
Property Operating Statement

General Information
Property ID: 800000000
FHA Number: 00035194
Property Name: OMHAR Property
PAE Name: Test PAE

Annual Revenue	Comments	Pre-Restructuring <small>As of FY ending 12/31/2000</small>			Post-Restructuring <small>As of 03/30/2001</small>			System-Generated Difference					
		Project Total	/Unit /Annum	/Unit /Month	Project Total	/Unit /Annum	/Unit /Month	Project Total	/Unit /Annum	/Unit /Month			
Gross Residential Income <small>(Non-Section 8 Project Based Units)</small>													
Gross Residential Income <small>(Section 8 Project Based Units)</small>		947,484.00	7,641.00	636.75	932,640.00	7,521.29	626.77	14,844.00	119.71	9.98			
Commercial													
Other		4,881.00			4,739.00			142.00					
Gross Potential Income		952,365.00	7,618.92	634.91	937,379.00	7,499.03	624.92	14,986.00	119.89	9.99			
Residential Vacancy													
Pre(3.8)% Post(5.0)%		35,584.00			46,632.00			11,048.00					
Residential Bad Debt													
Pre(1.4)% Post(2.0)%		13,276.00			18,653.00			5,377.00					
Commercial Vacancy													
Pre()% Post()%													
Commercial Bad Debt													
Pre()% Post()%													
Effective Gross Income		903,505.00	7,228.04	602.34	872,094.00	6,976.75	581.40	31,411.00	251.29	20.94			

Annual Expenses	Comments	Pre-Restructuring <small>As of FY ending 12/31/2000</small>			Post-Restructuring <small>As of 03/30/2001</small>			System-Generated Difference					
		Project Total	/Unit /Annum	/Unit /Month	Project Total	/Unit /Annum	/Unit /Month	Project Total	/Unit /Annum	/Unit /Month			
Base													
Real Estate Taxes		43,849.00	350.79	29.23	47,105.00	376.84	31.40	3,256.00	26.05	2.17			
Insurance		18,381.00	147.05	12.25	26,857.00	214.86	17.90	8,476.00	67.81	5.65			
Utilities		137,048.00	1,096.38	91.37	143,258.00	1,146.06	95.51	6,210.00	49.68	4.14			
Base Total		199,278.00	1,594.22	132.85	217,220.00	1,737.76	144.81	17,942.00	143.54	11.96			
Controllable													
Management Fees													
Pre()% Post()%		52,936.00	423.49	35.29	49,000.00	392.00	32.67	3,936.00	31.49	2.62			
Section 8 Administrative													
Other Administrative		46,031.00	368.25	30.69	33,766.00	270.13	22.51	12,265.00	98.12	8.18			
Salaries and Benefits		66,661.00	533.29	44.44	63,353.00	506.82	42.24	3,308.00	26.47	2.21			
Repairs and Maintenance		76,772.00	614.18	51.18	76,273.00	610.18	50.85	499.00	4.00	0.33			
Other Controllable													
Controllable Total		242,400.00	1,939.20	161.60	222,392.00	1,779.14	148.26	20,008.00	160.06	13.34			
Other													
Security													
Neighborhood Network													
Other Total		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00			
Total Expenses		441,678.00	3,533.42	294.45	439,612.00	3,516.90	293.07	2,066.00	16.52	1.38			

Net Income	Comments	Pre-Restructuring <small>As of FY ending 12/31/2000</small>			Post-Restructuring <small>As of 03/30/2001</small>			System-Generated Difference					
		Project Total	/Unit /Annum	/Unit /Month	Project Total	/Unit /Annum	/Unit /Month	Project Total	/Unit /Annum	/Unit /Month			
Net Operating Income		461,827.00	3,694.62	307.88	432,482.00	3,459.86	288.32	29,345.00	234.76	19.56			
Reserve for Replacement Contributions		24,828.00	198.62	16.55	24,828.00	198.62	16.55	0.00	0.00	0.00			
Adjusted Net Operating Income		436,999.00	3,495.99	291.33	407,654.00	3,261.23	271.77	29,345.00	234.76	19.56			
1st Mortgage Annual Debt Service		\$336,768.00	\$2,694.14	\$224.51	\$336,768.00	\$2,694.14	\$224.51	\$0.00	\$0.00	\$0.00			
IRP Applied to Debt Service													
Total Amount of 1st Mortgage Debt Service Less IRP		336,768.00	2,694.14	224.51	336,768.00	2,694.14	224.51	0.00	0.00	0.00			
Net Cash Flow (After Debt Service)		100,231.00	801.85	66.82	70,886.00	567.09	47.26	29,345.00	234.76	19.56			
Debt Service Coverage Ratio		1.30			1.21			0.09					

Other Income

* Value is from the Property and Loan Information Page's Annual Debt Service with MIP

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Figure 8-16, Form 10.2 Property Operating Statement

8.3.3 Refinancing

If refinancing the existing mortgage is involved for the property, because it is a Tier 2, click the **Refinancing Sheet** button to go to the refinancing section, as represented in Figure 8-17, Refinancing Sheet.

Note: A property undergoing a debt restructuring is designated as a Mortgage Restructuring and is covered in Section, 8.2, Mortgage Restructuring Forms.

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Form 10.2

Refinancing

Property ID: 800016640

FHA Number: 04635442

Property Name: Greenfield Meadows

PAE Name: Ohio Housing Finance Agency

Remember to save all changes or updates by clicking **Save** button on the left.

	Pre Restructuring	Post Restructuring	System Generated Difference
Originator		<input type="text"/>	
Loan Type	<input type="text"/>	<input type="text"/>	
FHA Program Type	221(d)(4)MKT	<input type="text"/>	
Original Loan Amount	82,800.00	<input type="text"/>	<input type="text"/>
UPB as of 07/04/1999	659,201.36		
Annual Debt Service (Without MIP)	65,188.56	<input type="text"/>	<input type="text"/>
Annual Debt Service (With MIP)	<input type="text"/>	<input type="text"/>	<input type="text"/>
Loan Terms:			
Interest Rate (%)	7.5000	<input type="text"/>	<input type="text"/>
Original Term (Months)	480	<input type="text"/>	<input type="text"/>
Remaining Amortization Period (Months)	<input type="text"/>	<input type="text"/>	<input type="text"/>
Maturity Date	07/01/2018	<input type="text"/>	
<input type="button" value="Comments *"/>			

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Figure 8-17, Refinancing Sheet

8.4 Submitted Plans Awaiting Decisions

OAHP users have the capability to review Restructuring Plan Forms prior to submission or plans submitted by PAEs. Those submitted require approval or return for revision decisions. Click the [Review Submitted Plans](#) link on the **Restructuring Plans** menu to select search criteria for generating a list of submitted Restructuring Plans (as illustrated in Figure 8-18, Review of PAE Plan Submissions).

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Review of PAE Plan Submissions

PAE Name: Florida Housing Finance Corporation

State	Property Name	Property	Renewal Type	Date Submitted	OAHP Decision	Comments
FL	CARVER GARDENS	800003978	Mortgage Restructuring	05/31/2001	Decision Pending	<input type="button" value="PAE"/> <input type="button" value="OAHP *"/> <input type="button" value="TRANS"/>

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Figure 8-18, Review of PAE Plan Submissions

The following steps direct OAHP users in reviewing and approving or returning PAE-submitted Restructuring Plan Forms:

1. Click an underlined **Property Name** link to view property and loan data used to develop the Restructuring Plan
2. After reviewing Restructuring Plan data, select of the options in the OAHP Decision field

OMHAR Decision

Pending

Approve

Return for Revision

Pending

3. Review comments entered by the PAE in the PAE Comment Box. If desired, enter comments about the OAHP Decision in the OAHP Comment box

Comments

OMHAR PAE

4. Repeat steps 1 through 3 for each additional decision on the remaining restructuring plans

5. After all decisions have been made on the Restructuring Plans, enter your first name and last name in the To Continue, Enter Your First and Last Name field

To continue, enter your first and last name:

6. Enter your e-mail address in the Enter your complete e-mail address field

Enter your complete e-mail address:

7. The system date populates the Enter Today's Date field. If necessary, it may be overwritten by the end-user if a corrected approval/return date needs to be entered

Enter Today's Date: 07/11/1999

8. Click the Submit Decisions button to save the Restructuring Plan decisions in the system. An approval message window (shown as Figure 8-19, Approval Message Window, provides the user with additional detail information:

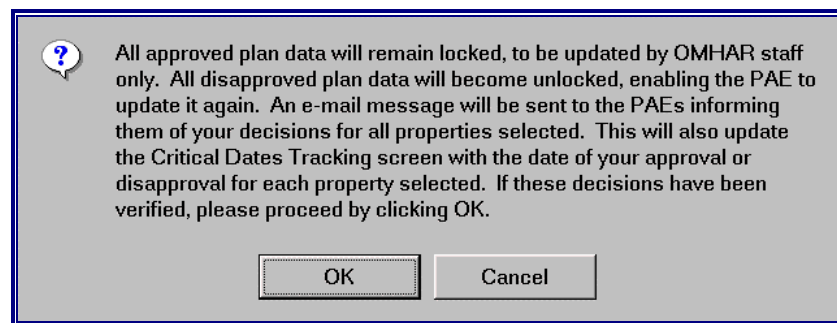


Figure 8-19, Approval Message Window

The successful submission of the restructuring plan form to OAHP HQ will automatically populate the Critical Dates Tracking date field "PAE Submits Restructuring Plan to OAHP" for that respective property (depending upon the renewal option type).

9 CLOSING MODULE

This module is designed to display, track, and update specific closing information from the Restructuring Plans information in the M2M system. This module should prove essential to OAHP in collecting some of the data necessary to report total dollar savings from the M2M program.

There is a search screen when this module is selected as shown below in Figure 9-1, Select Search Criteria for Closing Screen.

Figure 9-1, Select Search Criteria for Closing Screen

Select one of the following criteria available to retrieve properties for the Closing properties:

- ◆ Enter a REMS ID for a specify property
- ◆ Enter a FHA Number for a specific property

Or select one or more of the following options available to retrieve the Closing properties:

- ◆ Select an **OAHP Region** from the drop-down list
- ◆ Select a **State** from the drop-down list
- ◆ Select a **PAE Name** from the drop-down list
- ◆ Enter a **Property's Name**
- ◆ Select a **Closing Date** from the drop-down list
- ◆ Click the underlined **HERE** link to retrieve all closing properties in the system





The optional selections of **Closing Date Month** and **Closing Date Year** may be selected by themselves or in combination with the other selections. Figure 9-2, Closed Properties Screen, show the results of the search screen. Properties will only appear if their plan has been approved and a closing date has been entered. Clicking an underlined contract number link will take the user directly to the Mortgage Restructuring Closing screen for that property as shown below in Figure 9-3, Mortgage Restructuring Closing Screen.

[Home](#)
[Back](#)
[Log Off](#)

Closed Properties

The following 4 out of 4 properties met your All search criteria.

To view/update a contract's closing information, click its underlined Contract Number.

PAE Name	Status	Property Name	Model Uploaded	Sec 8 Contract Number	Closing Date	Expiration Date	Property City	State
Florida Housing Finance Corporation	A	CARAVAN APTS		FL29M000114	12/12/2000	06/30/1999	JACKSONVILLE	FL
VENCOR, INC.	A	Holden House Apartments		OH10M000242	12/25/2001	09/30/1999	DAYTON	OH
VENCOR, INC.	A	WINDSOR PLACE		OH16H051005	11/30/2001	10/13/1999	LANCASTER	OH
OMHAR Transaction Center	A	1890 HOUSE		RI43M000070	06/20/2001	06/30/1999	PROVIDENCE	RI

[HUDweb Housing](#) |
 [HUDweb Help](#) |
 [HUDweb Search](#) |
 [HUDweb Home](#) |
 [Privacy](#) |

Figure 9-2, Closed Properties Screen

9.1 Mortgage Restructuring Closing Screen

The following sections provide information on the data required to complete the Closing Terms. The user may opt to upload and populate the terms with data extracted from the Excel Underwriting Model or key the data manually. Figure 9-3, Mortgage Restructuring Closing Screen, provides an example of the Mortgage Restructuring Closing main screen with subdivisions for the model functions and the online closing screen.



Figure 9-3, Mortgage Restructuring Closing Screen

9.1.1 Excel Underwriting Model v4

The following subsections provide detailed instructions showing how to upload the Extract data and Model to the M2M System:

- ◆ Instructions for uploading the Model v4 and the Model data (Closing)
- ◆ Upload extracted data into the online Closing Module
- ◆ Upload a copy of the Model for centralized storage
- ◆ Open or Download Model

9.1.1.1 Instructions for uploading the Model v4 and the Model data (Closing)

The Instructions for uploading the Model v4 and the Model data (Closing) (shown on the next page as Figure, 9-4, How to Upload Extract and Model screen) contains general and detailed information of the process to upload extracted data and model to the M2M system for closing:

[Print](#) [Close](#)

How to Upload Extract and Model to M2M System

The M2M system has been upgraded to allow for PAEs to

1. upload data from the M2M Excel Underwriting Model v4 automatically, (without having to perform data entry into the M2M Form 5.2). This new feature only works with the **version 4** of the model. Also,
2. the M2M Excel Underwriting model being submitted for review and approval must be uploaded and saved on this centralized, protected server.

Steps to Perform the Two Tasks:

To prepare the Model for uploading into the M2M system Form 5.2 online:

1. Complete the data entry in the Underwriting Model v4 and save as the name - REMS Property Id.xls or .xlsm (e.g., 800000000.xls). It is very important to note the location where the model is saved and the REMS #.
2. Go to the Worksheet Tab in the model named: "Create MIS Upload Worksheet."
3. Click on the Button "Create Extract File."
4. An "extract" file is created automatically and saved in the SAME folder or location as the current Model.
5. The extract file is automatically named the REMS property id.txt (e.g., 8000000000.txt).
6. Print a copy of the worksheet called "Form 5.2 Data" – to use in the validation of the uploaded data.

To Upload the Extracted Data in order to populate the Form 5.2 online:

1. Log into the M2M system and go to the Restructuring Plans Module.
2. Search for the property associated with the model to be uploaded.
3. Select the property.
4. From the Restructuring Plans screen, select the option: Upload extracted data into the online Form 5.2
5. Either type in the path or location of the extract file (txt file) or click on Browse to find it on the workstation. (It will be in the same folder as the model).
6. Click on the button "Upload the File."
 - If the filename or type of file is incorrect there will be an error displayed.
 - If the filename matches the REMS property id and is the correct file, the data will be extracted and populate the Form 5.2 automatically.
7. First, a screen with data will appear. The PAE should review the data by comparing the printout from the Model "Form 5.2 Data" worksheet.
8. Click on Save if the data is valid.
9. If there were errors in the data and the PAE doesn't want to save the data into the system, cancel by clicking the Back button.
10. If there were errors, review the model and make corrections in the model. Save the corrections and start over by creating a new extract file as described above.

To upload and save a copy of the M2M Excel Underwriting Model on the centralized server:

1. Go to the Restructuring Plans Module in M2M system.
2. Select the property.
3. From the Restructuring Plans screen select the option: Upload a copy of the Model for centralized storage
4. Either type in the path or location of the Model (excel) file or click on Browse to find it on the workstation.
5. Click on the Button "Upload the File."
6. An error will display if there are problems, otherwise, click on Continue.
7. The model is now saved on the server.
8. If the PAE is ready to submit the restructuring plan to OAHP, click on Submit after uploading the model and extracted data to the M2M system.

For the PAE or OAHP to view or download to a workstation:

1. Go to the Restructuring plans screen.
2. Select the Property.
3. Select the option: Open or Download Model
4. If there is an error, it is most likely that the browser is not set up to view Excel and ".xls" needs to be added to the browser's list of applications.
5. Otherwise, choose "save" or "open" – depending on your need.

Figure 9-4, How to Upload Extract and Model Screen

9.1.1.2 Upload extracted data into the online Closing Module

The **Upload extracted data into the online Closing Module** (shown as Figure, 9-5, Upload (Closing) Screen) contains general and detailed information on how to upload extracted data into the online Closing Module:

[Home](#) [Back](#) [Log Off](#)

Mortgage Restructuring Properties Upload (Closing)

Property ID: 800000000 **FHA Number:** 08335299

Property Name: OMHAR Property

PAE Name: Test PAE

Note: This process is to upload the CLOSING TERMS that were extracted from the final closing model into the text file that was created by clicking the 'Create extract file' button on the 'Create MIS upload worksheet' in the Excel model.

The filename of the data extract to be uploaded must match the REMS property id and have a .txt extension. Performing this upload will overwrite any Closing Terms data for this property that has previously been saved.

Enter the path and name of the data extract file in the space below or click the browse button to locate the file on your workstation.

File to Upload:

[HUDweb Housing](#) | [HUDweb Help](#) | [HUDweb Search](#) | [HUDweb Home](#) | [Privacy](#) |

Figure 9.5, Upload (Closing) Screen

Click the Upload the File button to open the Mortgage Restructuring Upload (Closing) Screen (shown as Figure, 9-6, Mortgage Restructuring Upload (Closing) Screen):

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Figure 9.6, Green Retrofit Program Upload (Closing) Screen

Update data and click the Save button in the bottom of the Mortgage Restructuring Upload Closing screen to open the Information Saved Screen (shown as Figure, 9-7, Upload (Closing) Information Saved Screen), Then Click the Save button in the screen to save data into M2M database.

Figure 9.7, Upload (Closing) Information Saved Screen

9.1.1.3 Upload a copy of the Model for centralized storage

The Upload a copy of the Model for centralized storage (shown on the next page as Figure, 9-8, Excel Underwriting Model Upload Screen) contains general and detailed information on how to upload the Excel underwriting model:

Figure 9-8, Excel Underwriting Model Screen

9.1.1.4 Open or Download Model

The **Open or Download Model** function allows users to view or download the Excel Model that has been placed on the centralized server.

9.1.2 Online Closing

The following subsections provide additional information on the data that is required to populate Mortgage Restructuring Closing terms:

- ◆ Closing Module Screen
- ◆ Print the Transmission Memo
- ◆ Printable View of Closing Module Screen

9.1.2.1 Closing Module Screen

The Closing Module screen for the selected property, as shown below in Figure 9-10, Closing Module Screen, contains the following sections:

- ◆ Mark to Market Rents
- ◆ IRP
- ◆ CRP
- ◆ First Mortgage
- ◆ Second Mortgage
- ◆ Third Mortgage
- ◆ Sources
- ◆ Fund Uses
- ◆ Lead Based Paint Hazard
- ◆ Rehab Escrow
- ◆ Confirm

After reviewing the information, OAHP users may confirm the closing by entering their name and date in the locations at the bottom of the screen and clicking the **Confirm** button on the left menu. Any data changes that may have been made will also be saved. Data changes may be saved without confirming by clicking the **Save** button on the left menu. Also, the user may Upload extracted Data, Upload the Model, View the Model, or Print the Transmission Memo by clicking the following buttons on the left menu.

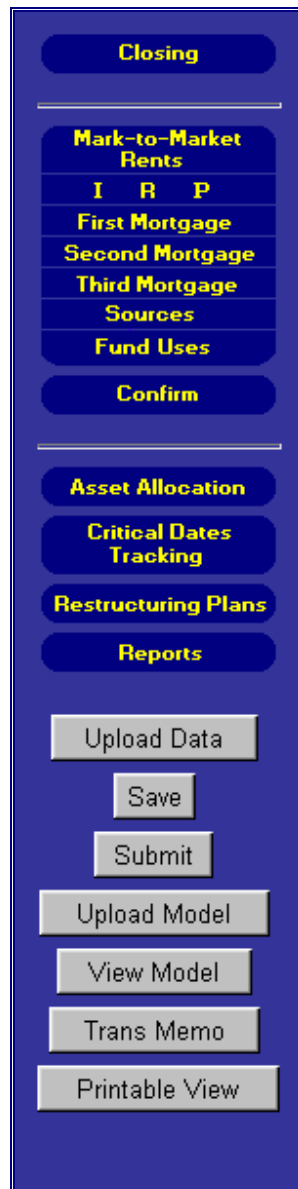


Figure 9-9, Closing Module Menu

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Figure 9-10, Closing Module Screen

9.1.2.2 Print the Transmission Memo

The **Print the Transmission Memo** (an example of which is on the next page as Figure, 9-11, Closing Memo for Mortgage Restructuring Properties) contains all the property's closing information for printing:

Office of Affordable
Housing Preservation

Memo

To: CAROL A. STEFFEN, Project Manager Coral Gables
From: Portfolio Office Director
Date: November 12, 2004
Subject: Mark-to-Market (M2M) Debt Restructuring Post Closing Transmission to HUD

Project Name: CENTRAL AREA APTS
Project Address: 2014 NW 5TH FL
 MIAMI, FLORIDA 33127

Date Closed: 07/28/2000
Date Model Uploaded:

Restructured Loans

Line Position*	Lender	Type of Loan	Post Closing PBA No.	Principal Amount
1st	One Lake Financial Group	FRBA Interest	04231074	250,000.00
2nd**	HUD	M2M Mortgage Restructuring Note	04231080V	3,439,239.71
3rd**	HUD	M2M Contingency Repayment Note	04231080W	3,179,627.29

* Line position and mortgage on vary. Endnotes should be modified to fit the terms of the transaction.
 ** This project has been transferred to a Qualified Non-Profit (QNP) in accordance with QPFO Appendix C. The purchaser has requested fingerprint/assignment notification of the M2M/CRN. Further confirmation and documentation will follow when this matter is complete.

Terms of 1st Mortgage

Interest Rate	Term	Monthly Date	Monthly P&I Payment (incl. MIP)
6.5000%	360 Mos.	11/01/2004	1,500.17

Terms of Mortgage Restructuring Note (MRN)

Interest Rate	Term	Monthly Date	Payment Term
1.0000%	360 Mos.	11/01/2004	63.0% of Surplus Cash

Terms of Contingent Repayment Note (CRN)

Interest Rate	Term	Monthly Date	Payment Term
1.0000%	360 Mos.	11/01/2004	63.0% of Surplus Cash after Payment of MRN

M2M Surplus Cash Calculation

Following projected first year cash flow of the transaction:

GR Gross Income (depreciated and unrecaptured loss + income & other income - vacancy/lost rents)	1,269,293.00
Less: Expenses	1,349,274.00
Reserve for Depreciation	70,000.00
CRP (assumed funds returned to owner, amount anticipated per underwriting)	3,931.00
Equal: ADRS	110,000.00
Less: 1st Mortgage Debt Service (includes MIP)	39,261.83
Plus: BIP	
Equal: Gross Cash Flow	97,724.95
Less: CRP owner investment fee, calculated 1st year, available thereafter if cash flow and performance allow, amount anticipated per underwriting	40,129.00
Equal: Surplus Cash Available for M2M (or CRN) and Owner Split	57,595.95
Amount to M2M (or CRN)	48,936.56
Amount to Owner	8,659.39

CRP and IPF

CRP - Monthly Payments	327.58
CRP - Number of Months	120
IPF - Percentage of Effective Gross Income	2.95

R4R

Initial Post M2M R4R Account Balance	494,331.81
R4R Minimum Annual Amount (includes QY receipts or BIP)	70,000.00
R4R Monthly Deposit (includes QY receipts or BIP)	6,200.00

Lead Based Paint Evaluation

Full Assessment/Repairs Completed	
Date Owner Received	
Lead Based Paint Report	
Lead Based Paint Report	

Rehab Escrow:

Include Total Amount Escrowed and Contingency Amount. Attach Schedule of Items and Costs.

Total Amount Escrowed	N/A
Contingency Amount	

Rehabilitation Escrow Administration:	
Cash Management	Organization and Contact Name: Address: Phone Number:
Repair Oversight	Organization and Contact Name: Address: Phone Number:

Other Escrow

Taxes Escrowed at Closing	70,262.38
Board Income Escrowed at Closing	33,690.83
Operating Deficit Escrow Amount	3,200.00

IRP and Section 8 Out-Year Recapture (if applicable)

IRP Available

IRP Payments to be made to R4R	
IRP Payments to be applied to 1st Mortgage Debt Service	
Number of Months	

Section 8 Out-Year Recapture Funds Available:

Section 8 Payments applied to R4R per Month (This amount plus the monthly R4R deposit amount get added together and total goes in the Regulatory Agreement as the owner's required R4R deposit)	
Section 8 Payments applied to 2nd & 3rd Mortgage Debt Service	
Section 8 Payments applied to Other Approved Uses	
Number of Months	
Expiration Date of Regulatory Agreement	12/30/2002

Rent Determination for Next HAP Contract (to be adjusted by OCAF if applicable):

0 Bedrooms	571.00
1 Bedroom	
2 Bedrooms	
3 Bedrooms	
4 Bedrooms	
5 Bedrooms	

Other Special Conditions or Issues:

Direct questions to PATRICIA AMERSON. Direct post-closing cash management questions to Jo Anne Garrison, OAHP Closing Technical Manager at 202-708-0001 x8376.

Please note that the information in this Transmission Memo is current as of the date of the Memo. Any updates to the data or changes to the transaction subsequent to the date of this Transmission Memo, may, however, make this Transmission Memo inaccurate. We will endeavor to keep you updated if changes occur post closing. If, however, you believe changes have occurred, you may always verify the accuracy of this information via an automatically updated version of this memorandum located in OAHP's MIS site (Closing Module) in Secure Systems. Approximately 90-120 days post closing you should receive a final docket of closing related documents that will be the final reference point for all information related to this restructuring.

Figure 9-11, Closing Memo

9.1.2.3 Printable View of Closing Module Screen

The **Printable View of Closing Module Screen** (an example of which is on the next page as Figure, 9-12, Printable View of Closing Module Screen) contains all the property's closing information for printing:

Mark-to-Market (M2M) Release 7. 2 Online System OAHF Users Guide

Closing Module Screen
For Mortgage Restructuring Properties

Property ID: 00000099
Previous FHA Number: 0603001
New FHA Number: 0603001
Property Name: CENTRAL AREA APPTS
PMF Name: Private Housing Finance Corporation
Preservation Office: Washington
Debt Restructuring Specialist:
Closing Date: 07/25/2000
Debt Service Coverage: Plus Taxes
Closing Time: 2:30

2nd
3rd
04/23/2001
04/23/2001

If this property was a TPA (Transfer of Physical Assets) to a QNP (Qualified New Profit), has the QNP requested forgiveness/assignment/modification of the Mortgage Restructuring Note? Yes

The Collateral Assignment Note? Yes

Mark to Market Results

Reference	Type	% of Post Restructuring Contract Value	Post Restructuring Monthly Market Rate	Post Market Rate Times at Closing	Post Monthly Exception Rate	Post Exception Rate Times at Closing
A						
B		20	110.80	403.80		371.08
C			408.80			
D			222.80			
E						
F						
G						

Section B Exceptions Agreement

TRF

Amount of TRF Available
 Amount of TRF Applied to This Section
 Amount of TRF Applied to Section B (TRF Amount)
 Amount of TRF Applied to Section C (TRF Amount)
 Amount of TRF Applied to Section D (TRF Amount)
 Amount of TRF Applied to Section E (TRF Amount)
 Amount of TRF Applied to Section F (TRF Amount)
 Amount of TRF Applied to Section G (TRF Amount)
 Amount of TRF Applied to Section H (TRF Amount)
 Amount of TRF Applied to Section I (TRF Amount)
 Amount of TRF Applied to Section J (TRF Amount)
 Amount of TRF Applied to Section K (TRF Amount)
 Amount of TRF Applied to Section L (TRF Amount)
 Amount of TRF Applied to Section M (TRF Amount)
 Amount of TRF Applied to Section N (TRF Amount)
 Amount of TRF Applied to Section O (TRF Amount)
 Amount of TRF Applied to Section P (TRF Amount)
 Amount of TRF Applied to Section Q (TRF Amount)
 Amount of TRF Applied to Section R (TRF Amount)
 Amount of TRF Applied to Section S (TRF Amount)
 Amount of TRF Applied to Section T (TRF Amount)
 Amount of TRF Applied to Section U (TRF Amount)
 Amount of TRF Applied to Section V (TRF Amount)
 Amount of TRF Applied to Section W (TRF Amount)
 Amount of TRF Applied to Section X (TRF Amount)
 Amount of TRF Applied to Section Y (TRF Amount)
 Amount of TRF Applied to Section Z (TRF Amount)

Capital Recovery Payment (CRP) Terms

CRP Monthly Payment: 127.00
 Payment at Closing: 127.00

First Mortgage (Take Out or Modified Loan)

Reference	Type	Amount	Rate	Term	Monthly Payment	Final Payment
A						
B						
C						
D						
E						
F						
G						
H						
I						
J						
K						
L						
M						
N						
O						
P						
Q						
R						
S						
T						
U						
V						
W						
X						
Y						
Z						

Second Mortgage (Mortgage Restructuring Note)

Reference	Type	Amount	Rate	Term	Monthly Payment	Final Payment
A						
B						
C						
D						
E						
F						
G						
H						
I						
J						
K						
L						
M						
N						
O						
P						
Q						
R						
S						
T						
U						
V						
W						
X						
Y						
Z						

Third Mortgage (Collateral Assignment Note)

Reference	Type	Amount	Rate	Term	Monthly Payment	Final Payment
A						
B						
C						
D						
E						
F						
G						
H						
I						
J						
K						
L						
M						
N						
O						
P						
Q						
R						
S						
T						
U						
V						
W						
X						
Y						
Z						

Guarantee

Reference	Type	Amount	Rate	Term	Monthly Payment	Final Payment
A						
B						
C						
D						
E						
F						
G						
H						
I						
J						
K						
L						
M						
N						
O						
P						
Q						
R						
S						
T						
U						
V						
W						
X						
Y						
Z						

Total Amount of Funds: \$1,210,210.00 \$7,210,210.00

First Lien

Reference	Type	Amount	Rate	Term	Monthly Payment	Final Payment
A						
B						
C						
D						
E						
F						
G						
H						
I						
J						
K						
L						
M						
N						
O						
P						
Q						
R						
S						
T						
U						
V						
W						
X						
Y						
Z						

Total Amount of Funds: \$1,210,210.00 \$7,210,210.00

Second Lien

Reference	Type	Amount	Rate	Term	Monthly Payment	Final Payment
A						
B						
C						
D						
E						
F						
G						
H						
I						
J						
K						
L						
M						
N						
O						
P						
Q						
R						
S						
T						
U						
V						
W						
X						
Y						
Z						

Total Amount of Funds: \$1,210,210.00 \$7,210,210.00

Third Lien

Reference	Type	Amount	Rate	Term	Monthly Payment	Final Payment
A						
B						
C						
D						
E						
F						
G						
H						
I						
J						
K						
L						
M						
N						
O						
P						
Q						
R						
S						
T						
U						
V						
W						
X						
Y						
Z						

Total Amount of Funds: \$1,210,210.00 \$7,210,210.00

Fourth Lien

Reference	Type	Amount	Rate	Term	Monthly Payment	Final Payment
A						
B						
C						
D						
E						
F						
G						
H						
I						
J						
K						
L						
M						
N						
O						
P						
Q						
R						
S						
T						
U						
V						
W						
X						
Y						
Z						

Total Amount of Funds: \$1,210,210.00 \$7,210,210.00

Fifth Lien

Reference	Type	Amount	Rate	Term	Monthly Payment	Final Payment
A						
B						
C						
D						
E						
F						
G						
H						
I						
J						
K						
L						
M						
N						
O						
P						
Q						
R						
S						
T						
U						
V						
W						
X						
Y						
Z						

Total Amount of Funds: \$1,210,210.00 \$7,210,210.00

Sixth Lien

Reference	Type	Amount	Rate	Term	Monthly Payment	Final Payment
A						
B						
C						
D						
E						
F						
G						
H						
I						
J						
K						
L						
M						
N						
O						
P						
Q						
R						
S						
T						
U						
V						
W						
X						
Y						
Z						

Total Amount of Funds: \$1,210,210.00 \$7,210,210.00

Seventh Lien

Reference	Type	Amount	Rate	Term	Monthly Payment	Final Payment
A						
B						
C						
D						
E						
F						
G						
H						
I						
J						
K						

10 REPORTS MODULE

The **Reports** module is accessed by selecting the **Reports** button from M2M's home screen. The reports within the module are a summarization of the data entered in the **Critical Dates Tracking** screens and are management tracking tools to view the overall status of where the assigned properties are in the restructuring process. In addition, there are internal management level reports to assist OAHP and its business partners in the management of its M2M Program assets.

Generally, only **active** properties in the M2M Program that are assigned to and accepted by a PAE appear in M2M's Reports, though some reports include **completed** properties and allow the User to choose what to be selected. In addition, there is specific criteria for each report, e.g., for the **Property Status Report**, only properties that have at least **one critical date** entered into the system are included on the report. The **Property and Report Selection** page is shown below as Figure 10-1, Property and Report Selection Screen:

[Home](#)
[Back](#)
[Log Off](#)

Property and Reports Selection

Report Information

Click On Report Title Below:

- Management Reports
- Assigned Active Properties Report
- Submitted Plans Awaiting Decision Report
- Property Status Report
- Overview of the Portfolio Status Report
- Partial Assignments Report

And View Its Description Here:

The Partial Assignments Report provides a listing of the properties that have been assigned to the designated PAE for completing a specific portion of the full restructuring process. The report shows the due dates and actual dates of the assigned phases. Also, there

Click Here

To View Printable Version Only ¹

Click Here

To View Screen Version

Click Here

To Download Electronic Version Only ²

Click On SELECT SEARCH OPTIONS Button To Continue:

SELECT SEARCH OPTIONS

Click On Clear Selections Button To Restore Default Settings:

Clear Selections

¹ To print a selected report:

1. Select the **View Printable Version** Button above.
2. Click '**Select Search Options**' Button.
3. Select search options and click '**Continue**' Button.
4. Select **Print** on the File menu.
5. Click on **Properties**.
6. Select **Letter** or **Legal*** on the Paper Size option.
7. Select **Potrait** or **Landscape*** on the Orientation option.
8. Click **OK**.

² To download a selected report:

1. Select the **Download Electronic Version** Button above.
2. Click '**Select Search Options**' Button.
3. Select search options and click '**Continue**' Button.
4. Click the "Save File..." button when it appears and name the file any name with a ".csv" extension (e.g., "testrept.csv").

Open Microsoft Excel (or other application of choice) and open the saved file. The file may now be resaved in the format of Excel or other chosen application.

Reports with an asterisk (*) must be printed in landscape mode on legal-sized paper.

[HUDweb Housing](#) | [HUDweb Help](#) | [HUDweb Search](#) | [HUDweb Home](#) | [Privacy](#) |

Figure 10-1, Property and Report Selection Screen

10.1 Property and Report Selection

The **Reports** module allows users to generate the following reports:

- ◆ Assigned Active Properties Report
- ◆ Submitted Plans Awaiting Decision Report
- ◆ Overview of the Portfolio Status Report
- ◆ Partial Assignments Report
- ◆ Late Submissions Report
- ◆ Rent Comparability Review Progress Report
- ◆ Rent Comparability Review Progress Report – Post M2M
- ◆ Rent Reduction Only Progress Report
- ◆ Mortgage Restructuring Progress Report
- ◆ Focus on Production Report
- ◆ Properties On Hold Report
- ◆ Underwriting Tracking Report

To view a report, click the report title in the scroll down selection box and click one of the viewing options. Reports may be viewed on-screen, printed, or downloaded and saved in an electronic format. Next, click the Select Search Options button and make your selections in the opened window.

To save a downloadable version of a report:

1. Select the Download Electronic Version radio button
2. Click the 'Select Search Options' button
3. Select search options and click the 'Continue' button
4. Click the "Save File..." button and name the file a name with a ".csv" extension (e.g., "testrept.csv").
5. Open application of choice (e.g., Microsoft Excel) and the saved file.
6. The file may be resaved in the format of the application.

10.2 Assigned Active Properties Report

The **Assigned Active Properties Report** (Figure 10-2, Assigned Active Properties Report on the next page) contains a listing of all of the current M2M Program properties, the PAE to which each property is assigned, and the M2M Program phase in which each property resides.

[Home](#)
[Back](#)
[Secure Systems](#)
[Log Off](#)

Assigned Active Properties Report

Today's Date: 11/12/2004

Preservation Office: New York

PAE Name	Property Name	Section 8 Contract Renewal Type	Last Critical date	Date	Property ID	Property City	Property State
MASSACHUSETTS HOUSING FINANCE AGENCY	GRANITE PLACE	Mortgage Restructuring	OMHAR Sends List of Potential Assets	05/11/2001	800008520	QUINCY	MA
MASSACHUSETTS HOUSING FINANCE AGENCY	JUDSON HOUSE	Comp Review	PAE Accepts Assignment	12/11/2000	800008606	HAVERHILL	MA
MASSACHUSETTS HOUSING FINANCE AGENCY	OLDE ENGLISH VILLAGE	Rent Reduction Only	OAHP Receives Referral from Field Office	06/22/2001	800008744	GARDNER	MA
MASSACHUSETTS HOUSING FINANCE AGENCY	ORANGE APARTMENTS	Rent Reduction Only	OAHP Receives PAE Resubmission	05/06/2000	800008749	SPRINGFIELD	MA
MASSACHUSETTS HOUSING FINANCE AGENCY	TANNERY II	Rent Reduction Only	PAE Accepts Assignment	07/04/2000	800008918	PEABODY	MA

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Figure 10.2, Assigned Active Properties Report

10.3 Submitted Plans Awaiting Decision Report

The Submitted Plans Awaiting Decision Report contains a listing of all of the current restructuring plans submitted by PAEs that do not have an "Approved" or "Returned for Revision" status and are awaiting a decision from OAHP. Shown below in Figure 10.3, Submitted Plans Awaiting Decision Report, is an example of a Submitted Plans Awaiting Decision Report.

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Submitted Plans Awaiting Decision Report

Today's Date: 11/12/2004

Preservation Office: Chicago

PAE Name	Property Name	Property State	Section 8 Contract Renewal Type	Property ID	Date Submitted
Ohio Housing Finance Agency	JEFFREY PLACE	OH	Mortgage Restructuring	800016766	10/10/2003

Preservation Office: New York

PAE Name	Property Name	Property State	Section 8 Contract Renewal Type	Property ID	Date Submitted
Pennsylvania Housing Finance Agency	MON VIEW HEIGHTS	PA	Mortgage Restructuring	800018680	08/22/2003

Preservation Office: Washington

PAE Name	Property Name	Property State	Section 8 Contract Renewal Type	Property ID	Date Submitted
Florida Housing Finance Corporation	CARVER GARDENS	FL	Mortgage Restructuring	800003978	05/31/2001

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Figure 10-3, Submitted Plans Awaiting Decision Report

10.4 Overview of the Portfolio Status Report

The **Overview of the Portfolio Status Report** (Figure 10-4, **Overview of the Portfolio Status Report**) is an overview of the status of all the Properties reflecting the Accepted, Submitted, Approved, Closing, and "Other Completed" Dates sorted by Preservation Office, PAE, State, and Property Name with the option to select completed, active, or all properties. Also, there is a direct link to the property's critical dates' page to view the current dates and update, if necessary.

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Overview of the Portfolio Status Report										
Today's Date: 11/12/2004										
Preservation Office: New York										
PAE Name	Property State	Property Name	Property ID	Status	Section 8 Contract Renewal Type	Accepted Date	Submitted Date	Approved Date	Closing Date	Other Completed Date
MASSACHUSETTS HOUSING FINANCE AGENCY	MA	GRANITE PLACE	800008520	Active	Mortgage Restructuring					
MASSACHUSETTS HOUSING FINANCE AGENCY	MA	JUDSON HOUSE	800008606	Active	Comp Review	12/11/2000				
MASSACHUSETTS HOUSING FINANCE AGENCY	MA	OLDE ENGLISH VILLAGE	800008744	Active	Rent Reduction Only					
MASSACHUSETTS HOUSING FINANCE AGENCY	MA	ORANGE APARTMENTS	800008749	Active	Rent Reduction Only	05/06/2000	05/06/2000			
MASSACHUSETTS HOUSING FINANCE AGENCY	MA	TANNERY II	800008913	Active	Rent Reduction Only	07/04/2000				
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Figure 10-4, Overview of the Portfolio Status Report

10.5 Partial Assignments Report

The **Partial Assignments Report** (Figure 10-5, **Partial Assignments Report**) is a list of all the Properties that are designated as partial assignments, sorted by Preservation Office, PAE, State, and Property Name with the option to select completed, active, or all properties. Also, there is a direct link to the property's critical dates' page to view the current dates and update, if necessary.

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Partial Assignments Report

Today's Date: 08/06/2008

Preservation Office: New York

PAE Name	State	Property Name	Property ID	Status	Due Diligence Due Date	Due Diligence Actual Date	Title Bring Down Order Actual Date	Title Bring Down Received Actual Date	Submit Due Date	Submit Actual Date	OAHP Executed Restructuring Plan Due Date	OAHP Executed Restructuring Plan Actual Date	Owner Executed Restructuring Commitment Due Date	Owner Executed Restructuring Commitment Actual Date		
CreditVest, Inc.	PA	LEO MEYER MANOR	800018604	Completed	10/10/2001	10/11/2001			10/30/2001	06/08/2001			11/01/2001	11/17/2001	01	
CreditVest, Inc.	RI	OXFORD PLACE	800019383	Completed	06/28/2001	06/29/2001			09/01/2001	08/20/2001			10/18/2001	09/17/2001	12	
Foley and Judell, LLP	MA	CITYWIDE APTS.	800028733	Completed						02/12/2002					07	
Heskin Signet Partnership	MA	OLDE ENGLISH VILLAGE	800008744	Completed						01/03/2003					03	

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Partial Assignments Report

Today's Date: 08/13/2008

New York

Property ID	Status	Due Diligence Due Date	Due Diligence Actual Date	Title Bring Down Order Actual Date	Title Bring Down Received Actual Date	Submit Due Date	Submit Actual Date	OAHP Executed Restructuring Plan Due Date	OAHP Executed Restructuring Plan Actual Date	Owner Executed Restructuring Commitment Due Date	Owner Executed Restructuring Commitment Actual Date	Closing Due Date	Closing Actual Date	Action Other Than Closing Date
800018604	Completed	10/10/2001	10/11/2001			10/30/2001	06/08/2001			11/01/2001	11/17/2001	01/30/2002	01/18/2002	
800019383	Completed	06/28/2001	06/29/2001			09/01/2001	08/20/2001			10/18/2001	09/17/2001	12/18/2001	01/03/2002	
800028733	Completed						02/12/2002					07/31/2002	07/29/2002	
800008744	Completed						01/03/2003					03/31/2004	03/31/2004	

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Figure 10-5, Partial Assignments Report

10.6 Late Submissions Report

The **Late Submissions Report** (Figure 10-6-1, **Late Submissions Report (Part I)**) provides a roll up of the total number of late plan submissions by type. Clicking on the total (underlined in blue) will provide details (Figure 10-6-2, **Late Submissions Report (Part II)**) on which properties comprise the total number, sorted by Preservation Office and by PAE. The last Milestone and date completed and the number of days the property is late is provided. Also, there is

a direct link to the property's critical date's page to view the current dates and update, if necessary.

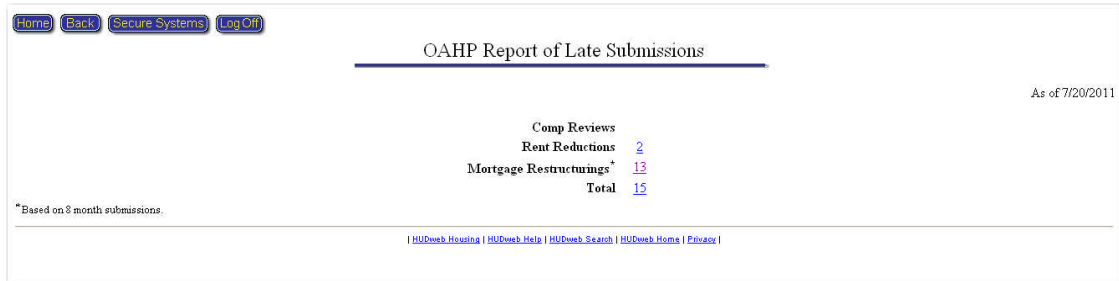


Figure 10-6-1, Late Submissions Report (Part I)

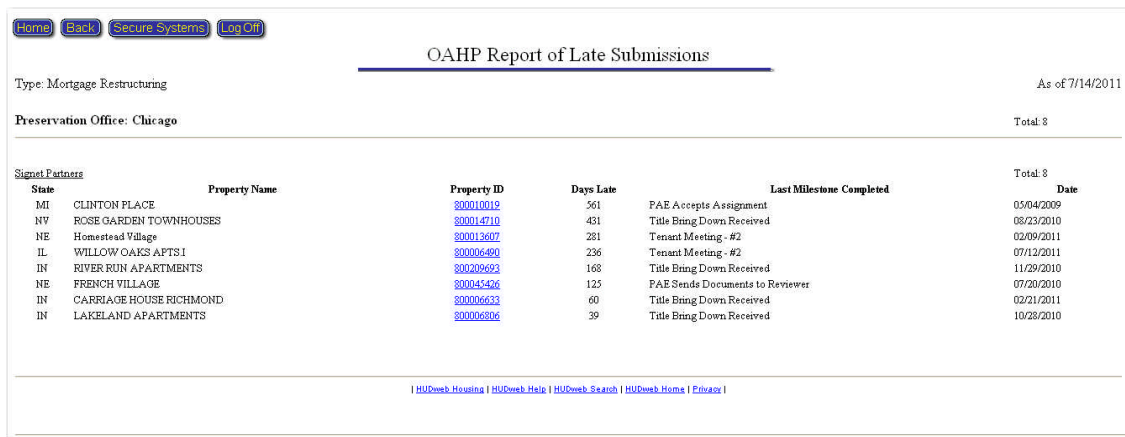


Figure 10-6-2, Late Submissions Report (Part II)

10.7 Rent Comparability Review Progress Report

The **Rent Comparability Review Progress Report** (illustrated as Figure 10.7 on the next page) represents the progress and status of the active Rent Comparability Review properties currently assigned to PAEs. It details the referral and acceptance dates, the dates review results were submitted to OAHP and the date OAHP approves the results.

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Rent Comparability Review Progress Report

Today's Date: 11/12/2004

	Property State	Status	Primary FHA Number	Field Office Refers to OAHP	OAHP Initial Assignment	OAHP Approves COI Form 2.2	PAE Accepts Assignment	PAE Submits Review Results to OAHP	OAHP Approves Review Results Date	Approved Review Results
Preservation Office: New York										
Indiana Housing Finance Authority										
ANTILLEAN MANOR COOPERATIVE	CT	Completed		09/24/1999	07/20/1999		03/05/2000			Review in Process
PAE Total				1	1	0	1	0	0	
MASSACHUSETTS HOUSING FINANCE AGENCY										
JUDSON HOUSE	MA	Active	02335147	09/24/1999	09/02/1999		12/11/2000			Review in Process
PAE Total				1	1	0	1	0	0	
Preservation Office Total				2	2	0	2	0	0	

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Figure 10.7, Rent Comparability Review Progress Report

10.8 Rent Comparability Review Progress Report – Post M2M

The **Rent Comparability Review Progress Report – Post M2M** (illustrated as Figure 10.8 on the next page) represents the progress and status of the Post M2M Program Rent Comparability Review properties currently assigned to PAEs. It details the referral and acceptance dates, the dates review results were submitted to OAHP and the date OAHP approves the results.

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Post M2M Rent Comparability Review Progress Report

Today's Date: 11/12/2004

	Property State	Status	Primary FHA Number	Field Office Refers to OAHP	OAHP Initial Assignment	OAHP Approves COI Form 2.2	PAE Accepts Assignment	PAE Submits Review Results to OAHP	OAHP Approves Review Results Date	Approved Review Results
Preservation Office: New York										
VENCOR, INC.										
FAIRLANE MEADOWS	AL	Active	06244041	02/18/2004	02/18/2004					Review in Process
BEECH HILL PARK	NH	Completed	02444006	11/06/2002	11/20/2002	11/20/2002				Review in Process
PAE Total				2	2	1	0	0	0	
Preservation Office Total				2	2	1	0	0	0	

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Figure 10.8, Rent Comparability Review Progress Report – Post M2M

10.9 Rent Reduction Only Progress Report

The **Rent Reduction Only Progress Report** represents the progress and status of the active M2M Program Rent Reduction Only properties currently assigned to PAEs. It details the referral and acceptance dates, the dates the PAE executes M2M Program tasks, the dates the Rent Reduction Only Restructuring Plan was submitted to OAHP and the date OAHP issues a decision on submitted plans.

Figure 10-9, Rent Reduction Only Progress Report (Part I) and Figure 10-10, Rent Reduction Only Progress Report (Part II), shown below, is an example of the Rent Reduction Only Progress Report.

Note: It is necessary to load legal-sized paper and set your printer to print in landscape mode for this progress report.

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Rent Reduction Only Progress Report -- Part I

Today's Date: 08/13/2008

	Property State	Status (*Partial)	Primary FHA Number	OAHP Initial Assignment	OAHP Approves COI Form 2.2	PAE Accepts Assignment	Tier 1 Due Date	Amended Tier 2 Due Date (Per Rel. Mgr.)	Tenant Notice Sent	PCA Assigned by PAE	Appraisal Assigned by PAE	PAE's PCA Complete	PAE's Appraisal Complete	PAE Submits Justification for Recommendation (Form 10.2)	OAI Receives Comp PA Justification (Form 10.2)
Preservation Office: Washington															
First Housing Development Corporation															
LAKE WALES GARDENS	FL	Active	06792011	11/02/2005	11/18/2005	11/28/2005	02/26/2006	08/29/2006	12/14/2005	12/02/2005	12/02/2005			05/25/2006	05/26/2006
PLAZA APARTMENTS (THE)	NC	Active	05335286	08/09/2006	08/18/2006										
STANLEY SQUARE	NC	Active	05335840	05/25/2006	06/01/2006	06/07/2006	09/05/2006		07/11/2006	06/08/2006	06/08/2006			08/21/2006	08/22/2006
PAE Total				3	3	2	2	1	2	2	2	0	0	2	2
Housing Authority of the City of Atlanta															
PEACHTREE VILLAS APARTMENTS	GA	Active	06111133	03/28/2006	04/04/2006	03/29/2006	06/27/2006		04/24/2006	04/24/2006	04/24/2006			06/16/2006	06/19/2006
PAE Total				1	1	1	1	0	1	1	1	0	0	1	1
NW Financial Group															
VINE ASSOCIATES	CT	Active	01735071	08/30/2006											
SOUTHWICK BLOCK APTS	MA	Active	02335176	05/25/2006	05/31/2006	06/01/2006	08/30/2006		06/07/2006	06/08/2006	06/07/2006			08/15/2006	08/16/2006
THE BROOK APARTMENTS	NY	Active	01335132	07/28/2006	08/08/2006	08/11/2006	11/09/2006			08/14/2006	08/15/2006				
Falmouth Estates	WV	Active	04511006	05/09/2006	05/12/2006	05/21/2006	08/19/2006		06/07/2006	05/21/2006	05/21/2006			07/26/2006	07/28/2006
Potomac Heights	WV	Active	04535206	11/23/2005	11/30/2005	12/01/2005	03/01/2006			12/12/2005	12/12/2005			03/28/2006	02/15/2006
Twin Rivers Tower	WV	Active	04535117	11/30/2005	12/02/2005	12/06/2005	03/06/2006		01/17/2006	12/12/2005	12/12/2005			02/07/2006	02/08/2006
PAE Total				6	5	5	5	0	3	5	5	0	0	4	4
RER Solutions, Inc.															
FILLMORE I	AZ	Active	12335128	05/29/2003											
GADSWAY VILLAGE APARTMENTS	KY	Active	08335622	06/21/2006	06/27/2006	07/03/2006	10/01/2006			07/11/2006	07/11/2006			08/31/2006	
Dunbar Towers	WV	Active	04535069	08/10/2004	09/27/2004	08/24/2004	11/22/2004	11/22/2006		09/01/2004	09/01/2004				
PAE Total				3	2	2	2	1	0	2	2	0	0	1	0
Preservation Office Total				13	11	10	10	2	6	10	10	0	0	8	7

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Rent Reduction Only Progress Report -- Part I

Today's Date: 08/13/2008

Property	Status (*Partial)	Primary FHA Number	OAHP Initial Assignment	OAHP Approves COI Form 2.2	PAE Accepts Assignment	Tier 1 Due Date	Amended Tier 2 Due Date (Per Rel. Mgr.)	Tenant Notice Sent	PCA Assigned by PAE	Appraisal Assigned by PAE	PAE's PCA Complete	PAE's Appraisal Complete	PAE Submits Justification for Recommendation (Form 10.2)	OAHP Receives Complete PAE Justification (Form 10.2) Submission	OAHP Approves PAE Lite Recommendation
Washington															
ment Corporation															
	Active	06792011	11/02/2005	11/18/2005	11/28/2005	02/26/2006	08/29/2006	12/14/2005	12/02/2005	12/02/2005			05/23/2006	05/26/2006	06/28/2006
	Active	05333286	08/09/2006	08/18/2006											
	Active	05335840	05/23/2006	06/01/2006	06/07/2006	09/05/2006		07/11/2006	06/08/2006	06/08/2006			08/21/2006	08/22/2006	08/30/2006
Total			3	3	2	2	1	2	2	2	0	0	2	2	2
the City of Atlanta															
	Active	06111133	03/28/2006	04/04/2006	03/29/2006	06/27/2006		04/24/2006	04/24/2006	04/24/2006			06/16/2006	06/19/2006	07/28/2006
Total			1	1	1	1	0	1	1	1	0	0	1	1	1
	Active	01735071	08/30/2006												
	Active	02335176	05/23/2006	05/31/2006	06/01/2006	08/30/2006		06/07/2006	06/08/2006	06/07/2006			08/15/2006	08/16/2006	
	Active	01335132	07/28/2006	08/08/2006	08/11/2006	11/09/2006			08/14/2006	08/15/2006					
	Active	04511006	05/09/2006	05/12/2006	05/21/2006	08/19/2006		06/07/2006	05/21/2006	05/21/2006			07/26/2006	07/28/2006	08/23/2006
	Active	04535206	11/23/2005	11/30/2005	12/01/2005	03/01/2006			12/12/2005	12/12/2005			03/28/2006	02/15/2006	05/03/2006
	Active	04535117	11/30/2005	12/02/2005	12/06/2005	03/06/2006		01/17/2006	12/12/2005	12/12/2005			02/07/2006	02/08/2006	
Total			6	5	5	5	0	3	5	5	0	0	4	4	2
	Active	12335128	05/29/2003												
	Active	08335622	06/21/2006	06/27/2006	07/03/2006	10/01/2006			07/11/2006	07/11/2006			08/31/2006		
	Active	04535069	08/10/2004	09/27/2004	08/24/2004	11/22/2004	11/22/2006		09/01/2004	09/01/2004					
Total			3	2	2	2	1	0	2	2	0	0	1	0	0
Total			13	11	10	10	2	6	10	10	0	0	8	7	5

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Figure 10.9, Rent Reduction Only Progress Report (Part I)

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Rent Reduction Only Progress Report -- Part II

Today's Date: 08/13/2008

	Property State	Status (*Partial)	Primary FHA Number	OAHP Approves PAE Lite Recommendation	OAHP Notifies Sec. 8 Contract Administrator	PAE Notifies Sec. 8 Contract Administrator	PAE Receives Sec. 8 Contract Administrator's Confirmation of Receipt	PAE Notifies Owner of Recommendation to Convert to Mortgage Restructuring	OAHP Approves Tier 2 Conversion (Form 2.16)	OAHP Returns to PAE for Revision	OAHP Receives PAE Resubmission
Preservation Office: Washington											
First Housing Development Corporation											
LAKE WALES GARDENS	FL	Active	06792011	06/28/2006	06/20/2006	06/28/2006			05/31/2006		
PLAZA APARTMENTS (THE)	NC	Active	03335286								
STANLEY SQUARE	NC	Active	03335840	08/30/2006	08/31/2006						
PAE Total				2	2	1	0	0	1	0	0
Housing Authority of the City of Atlanta											
PEACHTREE VILLAS APARTMENTS	GA	Active	06111133	07/28/2006							
PAE Total				1	0	0	0	0	0	0	0
NW Financial Group											
VINE ASSOCIATES	CT	Active	01735071								
SOUTHWICK BLOCK APTS	MA	Active	02335176								
The BROOK APARTMENTS	NY	Active	01335132								
Falmont Arbors	WV	Active	04511006	08/23/2006							
Potomac Heights	WV	Active	04535206	05/05/2006				05/10/2006		03/13/2006	03/28/2006
Twin Rivers Tower	WV	Active	04535117								
PAE Total				2	0	0	0	1	0	1	1
RER Solutions, Inc.											
FILLMORE I	AZ	Active	12335128								
GAINESWAY VILLAGE APARTMENTS	KY	Active	08335622								
Dunbar Towers	WV	Active	04535069						08/24/2006		
PAE Total				0	0	0	0	0	1	0	0
Preservation Office Total				5	2	1	0	1	2	1	1

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Figure 10.10, Rent Reduction Only Progress Report (Part II)

10.10 Mortgage Restructuring Progress Report

The **Mortgage Restructuring Progress Report** details the progress and status of the active Mortgage Restructuring properties currently assigned to PAEs. It details the referral and acceptance dates, the dates the PAE executes M2M Program tasks, the dates the Mortgage Restructuring Plan was submitted to OAHP and the date OAHP issues a decision on submitted plans. An example of this report is presented as Figure 10-11, Mortgage Restructuring Progress Report (Part I) and Figure 10-12, Mortgage Restructuring Progress Report (Part II).

 **Note:** It is necessary to load legal-sized paper and set you printer to print in landscape mode for this progress report.

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<div>HomeBackSecure SystemsLog Off</div> <div>Mortgage Restructuring Progress Report</div> <div>(Critical Dates up to the Tenant Meeting - #2)</div>																						
Today's Date: 07/14/2011																						
	State	Status (*Partial)	Primary FHA Number	OAHP Initial Assign.	OAHP Approves COI Form 2.2	Amended PRA Milestone Date Per 2.15 Waiver	PAE Accepts Assign.	Owner Kickoff Meeting	PCA Assigned by PAE	PAE Sends Documents to Reviewer	OAHP Returns Documents for Fixes	PAE Resubmits Documents	OAHP Approves GPCA	Appraisal Assigned by PAE	Tenant Meeting - #1	Owner Submits Data Collection Report	PCA Complete	Appraisal Complete	PAE Completes Due Diligence	Title Bring Down Order	Title Bring Down Received	Tenant Meeting - #2
Preservation Office: Chicago																						
ONTRA, Inc.																						
St. Paul Village I	OH	Active	04644149	05/26/2009	06/09/2009	10/31/2010	06/12/2009	07/06/2009	06/19/2009					06/19/2009	07/21/2009	06/22/2009	07/27/2009	07/28/2009	09/18/2009	09/03/2009	09/16/2009	
UNION ACRES TRUST	TX	Active	11435034	12/20/2007	01/08/2008	05/31/2011	01/12/08	01/22/2008	01/23/2008					01/16/2008	02/26/2008	01/30/2008	03/04/2008	03/12/2008	03/12/2008	01/31/2008	02/22/2008	03/25/2008
PAE Total				2	2	2	2	2	2	0	0	0	0	2	2	2	2	2	2	2	2	1
Signet Partners																						
HACERDA DEL RIO	AZ	Active	1233160	12/14/2010	12/16/2010	08/21/2011	12/22/2010	05/03/2011	01/06/2011					01/06/2011	07/21/2011		02/08/2011	02/07/2011		06/21/2011	06/28/2011	
CREEKSIDE PLACE	CO	Active	10135112	07/01/2010	07/09/2010	03/31/2011	07/14/2010	07/15/2010	07/20/2010					07/20/2010	08/11/2010	08/30/2010	08/19/2010	08/19/2010	08/26/2010	07/19/2010	07/26/2010	02/16/2011
Robinson Heights Apartments	IA	Active	07435125	02/26/2010	03/02/2010	01/31/2011	03/03/2010	03/05/2010	03/25/2010					03/25/2010	03/06/2010	04/14/2010	04/22/2010	04/13/2010	04/22/2010	03/11/2010	03/19/2010	
FRIENDSHIP MANOR I	ID	Active	12411003	02/09/2011	02/11/2011		02/16/2011	02/18/2011	02/25/2011					02/25/2011	03/31/2011	03/29/2011	04/01/2011	03/22/2011	04/01/2011	03/07/2011	03/09/2011	
AURORA MANOR APARTMENTS	IL	Active	07111122	06/04/2010	06/11/2010	09/30/2011	06/17/2010	06/21/2010	07/08/2010					07/08/2010	07/21/2010	08/07/2010	08/16/2010	07/30/2010	08/16/2010	07/08/2010	07/15/2010	04/20/2011
RAYNIA HOUSE	IL	Active	07131467	02/13/2009	02/18/2009	08/31/2011	02/26/2009	02/27/2009	03/11/2009					03/11/2009	11/12/2009	10/21/2009	04/30/2009	04/09/2009	10/30/2009	09/17/2009	10/30/2009	06/08/2010
SLATE CREEK APARTMENTS	IL	Active	07211080	12/19/2009	01/06/2009	08/31/2011	01/12/2009	01/16/2009	01/20/2009					01/20/2009	02/24/2009	03/13/2009	03/26/2009	03/04/2009	03/26/2009	02/26/2009	03/03/2009	09/01/2009
WILDBERRY VILLAGE	IL	Active	07131734	05/26/2009	05/29/2009	07/29/2011	05/29/2009	06/07/2009	06/19/2009					06/19/2009	01/27/2010	02/09/2010	07/24/2009	07/13/2009	02/09/2010	01/13/2010	01/15/2010	11/17/2010
WILLOW OAKS APTS I	IL	Active	07231652	03/17/2010	03/19/2010	07/29/2011	03/25/2010	04/01/2010	04/07/2010					04/07/2010	10/20/2010	11/01/2010	05/04/2010	04/30/2010	11/11/2010	11/02/2010	11/11/2010	07/12/2011
BELMONT ESTATES	IN	Active	07331633	03/11/2009	03/17/2009	07/31/2011	03/23/2009	03/25/2009	03/31/2009					03/31/2009	04/23/2009	04/21/2009	06/01/2009	05/04/2009	06/01/2009	04/10/2009	03/01/2009	12/16/2009
CARRIAGE HOUSE NEW ALBANY	IN	Active	07331592	02/18/2011	02/23/2011		02/28/2011	07/08/2011	03/04/2011					03/04/2011			03/31/2011	04/06/2011				
CARRIAGE HOUSE RICHMOND	IN	Active	07311325	09/07/2010	09/14/2010	09/30/2011	09/17/2010	02/15/2011	09/30/2010					09/30/2010	03/24/2011	03/03/2011	11/04/2010	11/04/2010	03/24/2011	02/15/2011	02/21/2011	
ELGIN MANOR APARTMENTS	IN	Active	07311230	10/15/2009	10/20/2009	04/29/2011	10/23/2009	10/24/2009	11/11/2009					11/11/2009	12/16/2009	12/09/2009	12/11/2009	12/14/2009	01/13/2010	11/11/2009	01/13/2010	07/13/2010
LAKELAND APARTMENTS 2	IN	Active	07331630	09/30/2010	10/05/2010	08/31/2011	10/08/2010	10/21/2010	10/21/2010					10/21/2010	12/08/2010	11/08/2010	11/22/2010	11/23/2010	11/23/2010	10/21/2010	10/28/2010	
RIVER RUN APARTMENTS	IN	Active	07331551	05/19/2010	05/25/2010	07/29/2011	06/01/2010	06/03/2010	06/21/2010					06/21/2010	12/08/2010	08/12/2010	07/22/2010	07/21/2010	12/08/2010	11/15/2010	11/29/2010	
CLINTON PLACE	MI	Active *	04431500	04/04/2009	04/28/2009	12/31/2010	05/04/2009															
FOXEDGE	MI	Active	04732218	06/27/2011	06/28/2011		07/05/2011	07/11/2011														
VILLAGE MANOR APARTMENTS	MI	Active	04411079	05/05/2010	05/07/2010	09/30/2011	05/12/2010	05/14/2010	06/01/2010					06/01/2010	07/15/2010	07/04/2010	07/06/2010	07/06/2010	07/15/2010	06/24/2010	06/30/2010	04/21/2011
CHICAGO AVE. APARTMENTS	MI	Active	09231599	10/09/2009	10/14/2009	09/30/2011	10/19/2009	10/23/2010	11/11/2009					11/11/2009	06/23/2010	08/23/2010	01/21/2010	12/16/2009	06/23/2010	05/14/2010	06/02/2010	03/17/2011
FALLS MEADOWS TOWNHOUSES	MI	Active	09231538	10/23/2009	10/27/2009	06/30/2011	11/02/2009	03/22/2010	11/20/2009					11/17/2009	05/03/2010	04/20/2010	12/21/2009	12/14/2009	03/24/2010	03/15/2010	03/24/2010	12/15/2010
GREENVALE PLACE	MI	Active	09211197	07/21/2009	07/23/2009	09/30/2011	07/28/2009	03/22/2010	08/12/2009					08/12/2009	05/06/2010	05/05/2010	09/14/2009	09/17/2009	04/21/2010	04/13/2010	04/21/2010	12/16/2010
TOWER HILL APARTMENTS	MT	Active	09331513	12/14/2010	12/16/2010	08/14/2011	12/22/2010	05/02/2011	01/06/2011					01/06/2011	07/06/2011	06/20/2011	02/07/2011	02/09/2011	07/06/2011	06/07/2011	06/14/2011	
COMMUNITY HOMES I	ND	Active	09444001	06/17/2011	06/22/2011		06/27/2011	07/01/2011	07/11/2011					07/11/2011								
COMMUNITY HOMES II	ND	Active	09444007	06/17/2011	06/22/2011		06/27/2011	07/01/2011														
FRENCH VILLAGE	NE	Active	10311017	07/01/2010	07/09/2010	07/31/2011	07/14/2010	07/15/2010	07/20/2010	07/20/2010												
Homesend Village	NE	Active	10331021	01/29/2010	02/02/2010	07/31/2011	02/08/2010	02/11/2010	02/26/2010													
L-E-W HSG FOR ELDERLY	NE	Active	10311016	01/29/2010	02/02/2010	08/31/2011	02/08/2010	07/28/2010	02/26/2010					02/26/2010	08/31/2010	08/31/2010	03/29/2010	04/05/2010	06/31/2010	08/04/2010	08/11/2010	02/10/2011
Centennial Park Arms Apartments	NV	Active	12511057	12/14/2010	12/16/2010		12/22/2010	12/28/2010	01/06/2011					01/06/2011	02/08/2011	01/14/2011	02/07/2011	02/07/2011	02/07/2011	01/18/2011	01/25/2011	
Community Garden	NV	Active	12511062	12/14/2010	12/16/2010		12/22/2010	12/28/2010	01/06/2011					01/06/2011	02/09/2011	01/14/2011	02/09/2011	02/09/2011	02/09/2011	01/18/2011	01/21/2011	
ROSE GARDEN TOWNHOUSES	NV	Active	12544001	09/03/2009	09/09/2009	08/31/2011	09/11/2009	10/14/2010	10/05/2009					10/05/2009	11/30/2010	08/12/2010	01/13/2010	11/06/2009	11/30/2010	08/04/2010	08/23/2010	
WILSHIRE PLACE, LTD.	OH	Active	04331270	11/25/2008	12/02/2008	07/29/2011	12/05/2008	12/17/2008	12/17/2008					12/17/2008	01/20/2009	01/05/2009	03/11/2009	01/05/2009	03/11/2009	12/19/2008	01/06/2009	09/22/2009
MONUMENTAL PRIDE HOMES	TH	Active	08131072	01/12/2010	01/19/2010	06/30/2011	01/25/2010	02/01/2010	02/10/2010					02/10/2010	03/17/2010	03/12/2010	03/12/2010	03/05/2010	03/12/2010	02/25/2010	03/08/2010	
PAE Total				32	32	25	32	31	29	1	0	0	0	28	26	25	27	27	25	26	15	
Preservation Office Total				34	34	27	34	33	31	1	0	0	0	30	28	27	29	29	27	28	28	16
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Figure 10-11, Mortgage Restructuring Progress Report (Part I)

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Mortgage Restructuring Progress Report

(Critical Dates from PAE's Draft Plan Submission)

Today's Date: 08/13/2008

	State	Status (*Partial)	Primary FHA Number	PAE Submits Restr. Plan to OAHP	OAHP Receives Complete Restr. Plan and Form 5.2	Date Assigned to UW	OAHP Approves Restr. Plan	OAHP Returns Restr. Plan for Revision	OAHP Receives PAE Resub	Restructuring Plan Executed by OAHP	RC Executed by Owner	OAHP Approved 4.11 or 4.12	Scheduled Closing Date	Closing Date	New Section 8 Contract Effective Date	Closing Documents Distributed by PAE	
Preservation Office: San Francisco																	
Colorado Housing & Finance Authority																	
MARYMEAD PARK APARTMENTS	CA	Active	13633613	07/25/2006			08/28/2006										
PAE Total				1	0	0	1	0	0	0	0	0	0	0	0	0	0
OAHP WPO - ONTRA																	
VILLAGE SQUARE	WI	Active*	07544099														
PAE Total				0	0	0	0	0	0	0	0	0	0	0	0	0	0
Preservation Office Total				1	0	0	1	0	0	0	0	0	0	0	0	0	0

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Figure 10-12, Mortgage Restructuring Progress Report (Part II)

10.11 Focus on Production Report

The **Focus on Production Report** (Figure 10-13, Focus on Production Report (Part I)) provides a roll up of the total number of the expected submissions in the next two weeks, the next 6 months (by month) and the total for the next six months. By clicking on the total numbers underlined in blue, the properties expected to be submitted are detailed (Figure 10-14, Focus on Production Report (Part II)) by Preservation Office and PAE. Also, there is a direct link to the property's critical dates' page to view the current dates and update, if necessary.

Home Back Secure Systems Log Off				
Focus on Production Report				
As of 11/15/2004				
Plans Due	Total	Comp Reviews	Rent Reductions	Mortgage Restructurings
This Week	<u>6</u>		<u>3</u>	<u>3</u>
Next Week				
November, 2004	<u>21</u>		<u>13</u>	<u>8</u>
December, 2004	<u>21</u>	<u>2</u>		<u>19</u>
January, 2005	<u>12</u>		<u>4</u>	<u>8</u>
February, 2005	<u>15</u>		<u>2</u>	<u>13</u>
March, 2005	<u>30</u>		<u>1</u>	<u>29</u>
April, 2005	<u>7</u>			<u>7</u>
November, 2004 - April, 2005	<u>106</u>	<u>2</u>	<u>20</u>	<u>84</u>
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Figure 10-13, Focus on Production Report (Part I)

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Focus on Production Report

Plans (Mortgage Restructuring) Due in Week of 11/14/2004

Preservation Office: Washington

Total: 3

NW Financial Group

Total: 1

State	Property Name	Property ID	Date of Acceptance	Estimated Submission Date
NY	BURNIE C MCCARLEY GARDENS	800055705	04/23/2004	11/19/2004

Comment:

RER Solutions, Inc.

Total: 2

State	Property Name	Property ID	Date of Acceptance	Estimated Submission Date
MD	FOXWELL MEMORIAL APTS	800009221	07/21/2004	11/17/2004
MD	FRANKLIN SQUARE SCHOOL 100	800009224	07/21/2004	11/17/2004

Comment:

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Figure 10-14, Focus on Production Report (Part II)

10.12 Properties On Hold Report

The **Properties On Hold Report** (Figure 10-15, Properties On Hold Report) lists all assets currently On Hold. A property is placed on hold when impediments to the restructuring process are completely outside of the PAE's control. The 'OAHP Places Property On Hold' date freezes the property for all OAHP PRA required dates.

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Properties On Hold Report

Today's Date: 11/12/2004

	State	Status (*Partial)	Primary FHA Number	Section 8 Contract Renewal Type	Date put on Hold	Anticipated On Hold Removal Date
Preservation Office: Washington						
Florida Housing Finance Corporation						
TIDEWATER APARTMENTS	FL	Active	06335043	Rent Reduction Only	12/25/2000	12/31/2000
PAE Total					1	1
Jefferson County Assisted Housing Corp.						
TALLADEGA DOWNS	AL	Active	06244054	Mortgage Restructuring	07/30/2003	09/30/2003
PAE Total					1	1
Preservation Office Total					2	2

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Figure 10-15, Properties On Hold Report

10.13 Underwriting Tracking Report

The **Underwriting Tracking Report** (Figure 10-16, Underwriting Tracking Report by Preservation Office) lists all Full Debt Restructurings currently submitted to OAHP for Underwriting Review sorted by Preservation Office. (Figure 10-17, Underwriting Tracking Report by Underwriting Region) lists all Full Debt Restructurings currently submitted to OAHP for Underwriting Review sorted by Underwriting Region.

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Underwriting Tracking Report

Today's Date: 11/12/2004

	State	Status (*Partial)	Primary FHA Number	Date Originally Submitted	Date Currently Submitted	Date Assigned to Underwriter	Underwriter Name
Preservation Office: New York							
Underwriting Region: Washington							
Pennsylvania Housing Finance Agency							
MON VIEW HEIGHTS	PA	Active	03344044	08/22/2003	08/22/2003	08/30/2003	WILLIAM S RICHBURG
PAE Total				1	1	1	
Underwriting Region Total				1	1	1	
Preservation Office Total				1	1	1	

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Figure 10-16, Underwriting Tracking Report by Preservation Office

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Underwriting Tracking Report							
Today's Date: 11/12/2004							
	State	Status (*Partial)	Primary FHA Number	Date Originally Submitted	Date Currently Submitted	Date Assigned to Underwriter	Underwriter Name
Underwriting Region: Washington							
Preservation Office: New York							
Pennsylvania Housing Finance Agency							
MON VIEW HEIGHTS	PA	Active	03344044	08/22/2003	08/22/2003	08/30/2003	WILLIAM S RICHBOURG
PAE Total				1	1	1	
Preservation Office Total				1	1	1	
Underwriting Region Total				1	1	1	
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Figure 10-17, Underwriting Tracking Report by Underwriting Region

11 GREEN RETROFIT PROGRAM MODULE

The Green Retrofit Program module is accessible to OAHP, RO, PAE and Guest Account users by selecting the **Green Retrofit** button on M2M's home screen to open the Green Retrofit Program Screen. Guest Account users will see a limited set of the functions as view only.

 <p>October 13, 2009</p> <p>GRP Asset Allocation</p> <p>Green Retrofit Tracking</p> <p>GRP Closing</p> <p>GRP Reports</p> <p>Click on the mailbox to E-mail your comments and suggestions.</p>  <p>Dear Sir: C12724</p>	Home Back Secure Systems Log Off
	<h3>Green Retrofit Program (GRP)</h3>

Welcome to the Green Retrofit Program (GRP) created by the Office of Affordable Housing Preservation (OAHP). Title XII of Division A of the American Recovery and Reinvestment Act of 2009, P. L. 111-5 (the "Recovery Act"), in the section titled "Assisted Housing Stability and Energy and Green Retrofit Investments" under "Housing Programs", includes authority for HUD to make loans, make grants, and take a variety of other actions to facilitate utility-saving retrofits and other retrofits that produce environmental benefits, in certain existing HUD-assisted multifamily housing, subject to agreement between HUD and the Owner. These activities are undertaken to further the objectives of the Recovery Act, namely, to provide a necessary boost to our economy in these difficult times and to create jobs, restore economic growth, and strengthen America's middle class. The Recovery Act is designed to stimulate the economy through measures that, among other things, modernize the Nation's infrastructure, jump start American energy independence, and protect those in greatest need.

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Figure 11, Green Retrofit Program Screen

11.1 GRP Asset Allocation Module Button

The **Asset Allocation** button provides access for an OAHP HQ user to add or update properties to the Green Retrofit Program, after which, the PAE may be assigned properties by a HQ user.

11.2 Green Retrofit Tracking Module Button

The **Green Retrofit Tracking** button provides access to the GRP properties. Within this module, OAHP Users enter Tracking dates data in accordance with the predetermined Green Retrofit Program timeline for **GRP** properties.

11.3 GRP Closing Module Button

The **GRP Closing** button gives Users a facility for tracking and updating select Green Retrofit Properties information and to retain the actual closing figures.

11.4 GRP Reports Module Button

The **GRP Reports** button gives Users access to the reports in the system.

12 GRP ASSET ALLOCATION MODULE

The following screen (Figure 12-1, Asset Allocation Screen) will be returned when the Green Retrofit module button is clicked:

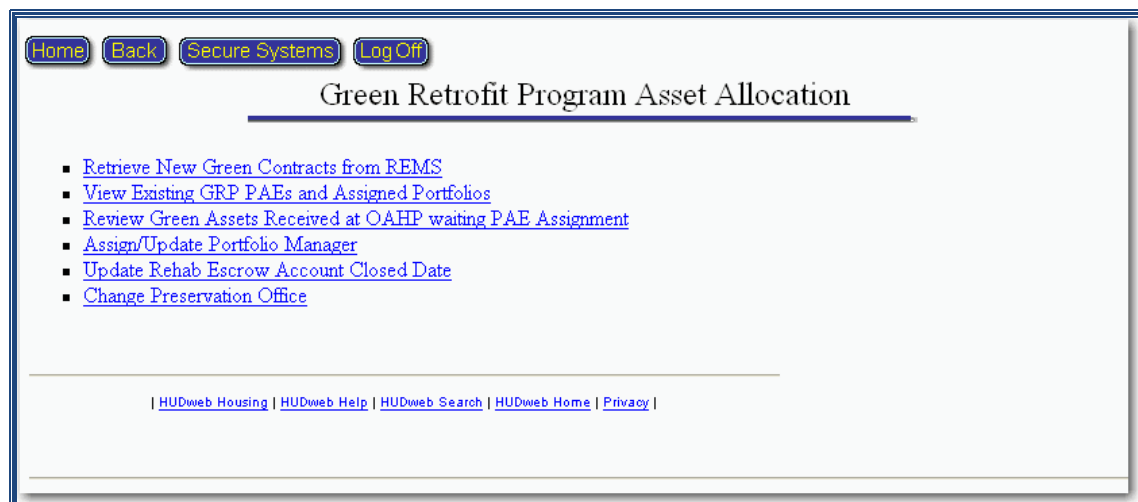


Figure 12-1, GRP Asset Allocation Screen

The **Green Retrofit Asset Allocation** screen allows access to the following functions:

- * Retrieve New Green Contracts from REMS
- * View Existing GRP PAEs and Assigned Portfolios
- * Review Green Assets Received at OAHP waiting PAE Assignment
- * Assign/Update Portfolio Manager
- * Update Rehab Escrow Account Closed Date
- * Change Preservation Office

12.1 Retrieve New Green Contracts from REMS Screen

OAHP HQ user should retrieve new Green contracts that qualify for the M2M Green Retrofit Program from the REMS database by clicking the **Retrieve New Green Contracts from REMS** link (located on the **Green Retrofit Asset Allocation** page). It may take several minutes for this process to complete. After the process has completed, a confirmation screen will appear. This facilitates a focused search of properties once contracts referred to OAHP have been retrieved (as illustrated in Figure 12-2, Select Search Criteria below).

The screenshot shows a web form titled "Select Search Criteria for Reviewing Assets to Enter M2M Green Retrofit Program via REMS". At the top, there are navigation buttons: Home, Back, Secure Systems, and Log Off. Below the title, the form asks the user to "Select one of the following criteria:" and provides input fields for "REMS ID:" and "FHA #:". Below this, it says "Or select one or more of the following options:" and provides a "Property:" text field, a "Section of Act (SOA):" dropdown menu, and a "State:" dropdown menu. At the bottom of the form are "Continue" and "Clear" buttons. Below the form, there is a link: "Or click [HERE](#) to get ALL the properties to Enter M2M Green Retrofit Program via REMS." At the very bottom, there is a footer with links: HUDweb Housing, HUDweb Help, HUDweb Search, HUDweb Home, and Privacy.

Figure 12-2, Select Search Criteria for Reviewing Assets to Enter M2M Green Retrofit via REMS

Select one of the following criteria available to search for properties to be received:

- * Enter a REMS ID for a specify property
- * Enter a FHA Number for a specific property

Or select one or more of the following options available to search for properties to be received:

- * Enter a Property's Name for a specific property
- * Section of Act (SOA)
- * Select a state from the drop-down list
- * Click the underlined [HERE](#) link to retrieve all referred properties awaiting to be received

Shown below in Figure 12-3, Review Assets to Enter M2M Green Retrofit Screen, is a sample screen of selected properties.

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[Back](#)
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Review Assets to Enter M2M Green Retrofit Program

The following 50 out of 61178 properties met your All search criteria.

- Check the Add box (☒) next to each property that you are adding to M2M Green Retrofit Program.
- Click the Submit button below to save your additions.

Add	Property Name	Property City	State	Sec 8	Contract Number	Expiration Date	FHA Num	Entity Type	Grant/Loan Type	Section of Act
<input type="checkbox"/>	WOODLAND ESTATES (TLR REALTY)		00		RM3Q991001	12/31/2008				Other
<input type="checkbox"/>	WOODLAND ESTATES (TLR REALTY)		00		RM3Q991001	12/31/2008	016HD025			811
<input type="checkbox"/>	13TH AND EAGLE APARTMENTS	ANCHORAGE	AK		AK02ED00001	10/31/2005				Other
<input type="checkbox"/>	ALPINE TERRACE	ANCHORAGE	AK		AK06ED00004	12/31/2006				Other
<input type="checkbox"/>	ALPINE TERRACE	ANCHORAGE	AK		AK06ED00004	12/31/2006	17633029			221(d)(4)MKT
<input type="checkbox"/>	AYALPIK APARTMENTS	BETHEL	AK		AK020006001	05/31/2021				Other
<input type="checkbox"/>	AYALPIK APARTMENTS	BETHEL	AK		AK020006001	05/31/2021	17633019			221(d)
<input type="checkbox"/>	AYALPIK APARTMENTS	BETHEL	AK		AK020006001	05/31/2021	17633019			221(d)
<input type="checkbox"/>	AYALPIK APARTMENTS	BETHEL	AK		AK020006001	05/31/2021	17633039			223(a)(7)
<input type="checkbox"/>	BAYSIDE APARTMENTS	SEWARD	AK		AK02MD00010	08/31/2010				Other
<input type="checkbox"/>	BAYSIDE APARTMENTS	SEWARD	AK		AK02MD00022	10/31/2008				Other
<input type="checkbox"/>	BAYSIDE APARTMENTS	SEWARD	AK		AK06L000005	09/30/1999				Other
<input type="checkbox"/>	BAYSIDE APARTMENTS	SEWARD	AK		AK02MD00010	08/31/2010	17644020			236
<input type="checkbox"/>	BAYSIDE APARTMENTS	SEWARD	AK		AK02MD00022	10/31/2008	17644020			236
<input type="checkbox"/>	BAYSIDE APARTMENTS	SEWARD	AK		AK06L000005	09/30/1999	17644020			236
<input type="checkbox"/>	BAYVIEW TERRACE	KODIAK	AK		AK020001001	07/31/2001				Other
<input type="checkbox"/>	BAYVIEW TERRACE	KODIAK	AK		AK020001001	07/31/2001	17633012			221(d)(4)MKT
<input type="checkbox"/>	CHEHANNA APARTMENTS	FAIRBANKS	AK		AK020002001	07/31/2007				Other
<input type="checkbox"/>	CHEHANNA APARTMENTS	FAIRBANKS	AK		AK020002001	07/31/2007	17633009			221(d)(4)MKT
<input type="checkbox"/>	CHEHANNA APARTMENTS	FAIRBANKS	AK		AK020002001	07/31/2007	17633009			221(d)(4)MKT
<input type="checkbox"/>	CHEHANNA APARTMENTS	FAIRBANKS	AK		AK020002001	07/31/2007	17633009			221(d)(4)MKT
<input type="checkbox"/>	CHEHANNA APARTMENTS	FAIRBANKS	AK		AK020002001	07/31/2007	17633042			223(a)(7)
<input type="checkbox"/>	CHESTER CREEK ESTATES	ANCHORAGE	AK		AK02MD00013	07/31/2004				Other
<input type="checkbox"/>	CHESTER CREEK ESTATES	ANCHORAGE	AK		AK02MD00023	07/31/2007				Other
<input type="checkbox"/>	CHESTER CREEK ESTATES	ANCHORAGE	AK		AK02MD00013	07/31/2004	17644024			236
<input type="checkbox"/>	CHESTER CREEK ESTATES	ANCHORAGE	AK		AK02MD00023	07/31/2007	17644024			236
<input type="checkbox"/>	CHESTER PARK ESTATES	ANCHORAGE	AK		AK02MD00012	08/31/2006				Other
<input type="checkbox"/>	CHESTER PARK ESTATES	ANCHORAGE	AK		AK06L000009	09/30/1999				Other
<input type="checkbox"/>	CHESTER PARK ESTATES	ANCHORAGE	AK		AK02MD00012	08/31/2006	17644018			236
<input type="checkbox"/>	CHESTER PARK ESTATES	ANCHORAGE	AK		AK06L000009	09/30/1999	17644018			236
<input type="checkbox"/>	CHINOOK APARTMENTS	JUNEAU	AK		AK06L000017	10/31/2006				Other
<input type="checkbox"/>	CHINOOK APARTMENTS	JUNEAU	AK		AK06L000017	10/31/2006	17611039			207/223(f)
<input type="checkbox"/>	CHINOOK APARTMENTS	JUNEAU	AK		AK06L000017	10/31/2006	17633024			221(d)(4)MKT
<input type="checkbox"/>	CHUGACH VIEW	ANCHORAGE	AK		AK020102002	11/30/2017				Other
<input type="checkbox"/>	COHO PARK	JUNEAU	AK		AK020007002	09/30/2006				Other
<input type="checkbox"/>	COHO PARK	JUNEAU	AK		AK020007002	09/30/2006	17611040			207/223(f)
<input type="checkbox"/>	COHO PARK	JUNEAU	AK		AK020007002	09/30/2006	17633020			221(d)(4)MKT
<input type="checkbox"/>	CRESTVIEW APARTMENTS	DILLINGHAM	AK		AK02R000005	06/30/2005				515
<input type="checkbox"/>	DAYBREAK APARTMENTS (CMD)	PALMER	AK		AK02T851001	03/14/2008				Other
<input type="checkbox"/>	DAYBREAK APARTMENTS (CMD)	PALMER	AK		AK02T851001	03/14/2008	17633003			202
<input type="checkbox"/>	EXECUTIVE ESTATES	FAIRBANKS	AK		AK020004001	05/31/2021				Other
<input type="checkbox"/>	EXECUTIVE ESTATES	FAIRBANKS	AK		AK020004001	05/31/2021	17633014			221(d)(4)MKT
<input type="checkbox"/>	EXECUTIVE ESTATES	FAIRBANKS	AK		AK020004001	05/31/2021	17633037			223(a)(7)
<input type="checkbox"/>	EXECUTIVE ESTATES	FAIRBANKS	AK		AK020004001	05/31/2021	17633037			223(a)(7)
<input type="checkbox"/>	EXECUTIVE ESTATES	FAIRBANKS	AK		AK020004001	05/31/2021	17633037			223(a)(7)
<input type="checkbox"/>	EXECUTIVE ESTATES	FAIRBANKS	AK		AK020004001	05/31/2021	17633040			223(a)(7)
<input type="checkbox"/>	FAIRBANKS COMMUNITY HOMES	FAIRBANKS	AK		AK06Q021001	12/31/2010				Other
<input type="checkbox"/>	FAIRBANKS COMMUNITY HOMES	FAIRBANKS	AK		AK06Q021001	12/31/2010	176HD021			811
<input type="checkbox"/>	GASTINEAU APARTMENTS	JUNEAU	AK		AK02MD00015	11/30/2003				Other
<input type="checkbox"/>	GASTINEAU APARTMENTS	JUNEAU	AK		AK02MD00015	11/30/2003	17644015			236

Enter Your Name: (First name, last name)

Before proceeding to another screen, save all changes by selecting the SUBMIT button.

Figure 12-3, Review Assets to Enter M2M Green Retrofit Screen

This screen is a summary of the PAEs (in alphabetical order) currently entered in the Green Retrofit Program. Assignment values on this screen are system-generated.

12.3 View/Unassign Green Retrofit Program PAE Properties Screen

To view or Unassign a Green Retrofit Program PAE's existing data, click its underlined link and the following View/Unassign Green Retrofit Program PAE Properties screen will be returned, Figure 12-5, Green Retrofit Program PAEs Screen:

Home Back Secure Systems Log Off

View/Unassign Green Retrofit Program PAE Properties

City of Chicago Department of Housing
Assigned Properties

To view/update a contract's critical dates, click its underlined contract number.

Property ID	Contract Status	Property Name	Contract Number	Entity Type	Grant/Loan	Section of Act	Expiration Date	Property City	Property State	Unassign Property
900078767	A	AASC Housing I, Inc.	AK06Q971001	Non-Profit	Grant/Loan	811	12/04/2006	ANCHORAGE	ALASKA	<input type="checkbox"/>
900000082	C	Andrews Apartments	AK06Q931001	Profit	Grant	811	12/31/2014	ANCHORAGE	ALASKA	<input type="checkbox"/>
900000101	C	DOUGLAS TERRACE APARTMENTS	AK06Q951003	Non-Profit	Grant/Loan	202	11/30/2006	JUNEAU	ALASKA	<input type="checkbox"/>

Save Changes

Figure 12-5, View/Unassign GRP PAE Properties Screen

OAHP HQ users may unassign a property from a PAE by putting a check mark (☒) in the **Unassigned Property** box next to each property that is to be unassigned. Once the **Save Changes** button is clicked, each property will then be available for reassignment to another PAE in the Review/Assign Green Retrofit Program Assets module.

12.4 Retrieve Green Assets Receive at OAHP waiting PAE Assignment Screen

OAHP HQ user should retrieve Green Retrofit Asset Assignment by clicking **Retrieve Green Assets Receive at OAHP waiting PAE Assignment** link (located on the **Green Retrofit Asset Allocation** page). After the process has completed, a confirmation screen will appear. (as illustrated in Figure 12-6, Select Search

Criteria below). This facilitates a focused search of Green Retrofit Asset Assignment properties have been retrieved.

The screenshot shows a web form titled "Select Search Criteria for Green Retrofit Program Asset Assignment". At the top, there are navigation buttons: "Home", "Back", "Secure Systems", and "Log Off". Below the title, the form is divided into two main sections. The first section, "Select one of the following criteria:", contains two input fields: "REMS ID:" and "FHA #:". The second section, "Or select one or more of the following options:", contains four dropdown menus: "Property:", "Section of Act (SOA):", "Entity Type:", and "State:". Below these dropdowns are two buttons: "Continue" and "Clear". At the bottom of the form, there is a link: "Or click [HERE](#) to get ALL the properties awaiting assignment." and a footer with links: "HUDweb Housing", "HUDweb Help", "HUDweb Search", "HUDweb Home", and "Privacy".

Figure 12-6, Select Search Criteria for Green Retrofit Assets Assignment

Select one of the following criteria available to search for properties to be received:

- * Enter a REMS ID for a specify property
- * Enter a FHA Number for a specific property

Or select one or more of the following options available to search for properties to be received:

- * Enter a Property's Name for a specific property
- * Section of Act (SOA)
- * Entity Type
- * Select a state from the drop-down list
- * Click the underlined [HERE](#) link to retrieve all referred properties awaiting to be received

12.5 Review / Assign Green Retrofit Program Assets Screen

The **Review / Assign Green Retrofit Program** screen is used to review and assign Green Retrofit Asset properties to PAEs within the M2M system. M2M generates recommended Green Retrofit property assignments based on

predefined geographical criteria. This screen allows the OAHP HQ user the ability to:

- ◆ Review a listing of all the Green Retrofit Program properties awaiting assignment in the M2M system
- ◆ Review the M2M Entity type and the option of changing it
- ◆ Review the Grant/Loan type and the option of changing it
- ◆ Review the Section of Act and the option of changing it
- ◆ Selecting one of the Preservation Office from the drop down list box.
- ◆ Choose a PAE for the Green Retrofit property

The screen is depicted below as Figure 12-7, Review/Assign Green Retrofit Assets Screen:

[Home](#)
[Back](#)
[Secure Systems](#)
[Log Off](#)

Review / Assign Green Retrofit Program Assets

The following 37 out of 37 properties met your All search criteria.

- Check the Assign box (☒) next to each property that you are assigning to a PAE. All of the contracts associated with the Green Retrofit Program property will be assigned.
- Click the Submit button below to save your assignments.

Assign	Property Name	Property City	State	Sec 8 Contract Number	Expiration Date	Entity Type	Grant/Loan Type	Section of Act	Preservation Office	Recommended PAE Name
<input type="checkbox"/>	COMMODORE PARK	ANCHORAGE	AK	AK065961001	12/31/2006	Profit		202		No Assigned PAE
<input type="checkbox"/>	Denali View Senior Housing	Chugiak	AK	AK065911002	05/04/2008	Profit	Grant	202		No Assigned PAE
<input type="checkbox"/>	ETOLIN HEIGHTS	WRANGLER	AK	AK061000008	06/30/2007	Profit	Grant	202		No Assigned PAE
<input type="checkbox"/>	FIREWEED HOUSING DEVELOPMENT	WASILLA	AK	AK060921001	07/05/2014	Profit	Grant	811		No Assigned PAE
<input type="checkbox"/>	AGAPE HOUSE	BIRMINGHAM	AL	AL090921010	06/21/2015	Profit		811		Jefferson County Assisted Housing
<input type="checkbox"/>	AGAPE II	BIRMINGHAM	AL	AL090961001	06/09/2007	Non-Profit		811		Jefferson County Assisted Housing
<input type="checkbox"/>	AHEPA 23 III	Montgomery	AL	AL095001002	08/31/2009	Profit		202		Jefferson County Assisted Housing
<input type="checkbox"/>	CLAIBORNE ARMS APTS	MOBILE	AL	AL090021022	10/31/2006	Profit	Grant/Loan	Mod Rehab		Jefferson County Assisted Housing
<input type="checkbox"/>	RAINFLOW APARTMENTS	Rainbow City	AL	AL090021050	09/30/2022	Profit	Grant/Loan	Other		Jefferson County Assisted Housing
<input type="checkbox"/>	Meadow Park Apartments	ROGERS	AR	AR37M000046	08/31/2006			221(d)		No Assigned PAE
<input type="checkbox"/>	Cannon Apts	LOS ANGELES	CA	CA16M0000385	12/31/2010	Profit	Grant	241/221		No Assigned PAE
<input type="checkbox"/>	DILLON CHRISTIANE WESTERN	SACRAMENTO	CA	CA30L000031	12/31/2010	Non-Profit	Grant	233(c)236		No Assigned PAE
<input type="checkbox"/>	EUCALYPTUS PARK	INGLEWOOD	CA	CA168023007	07/31/2006	Profit	Grant/Loan	221(d)(4)MKT		No Assigned PAE
<input type="checkbox"/>	TAMARIN APTS	DURANGO	CO	CO99H001082	05/31/2008	Non-Profit	Grant	524(c)		No Assigned PAE
<input type="checkbox"/>	Cavalier Apartments	WASHINGTON	DC	DC39A001003	02/23/2007	Non-Profit	Grant/Loan	223(a)(7)		No Assigned PAE
<input type="checkbox"/>	SOUTH SHORE BEACH APARTMENTS	CHICAGO	IL			Non-Profit	Grant	241/223		City of Chicago Department of Housing
<input type="checkbox"/>	Aberdeen Housing for Elderly	ABERDEEN	MD					Other		No Assigned PAE
<input type="checkbox"/>	Aberdeen Senior Housing	Aberdeen	MD					Other		No Assigned PAE
<input type="checkbox"/>	ABUNDANT LIFE TOWERS	BALTIMORE	MD					Other		No Assigned PAE
<input type="checkbox"/>	ABUNDANT LIFE TOWERS II	BALTIMORE	MD					Other		No Assigned PAE
<input type="checkbox"/>	Access	COLUMBIA	MD					Other		No Assigned PAE
<input type="checkbox"/>	ADVENT SENIOR HSG	BALTIMORE	MD					Other		No Assigned PAE
<input type="checkbox"/>	AIMCO	HYATTSVILLE	MD					Other		No Assigned PAE
<input type="checkbox"/>	ALDEN PARK APTS	COLLEGE PARK	MD					Other		No Assigned PAE
<input type="checkbox"/>	ALEXANDER HOUSE	HAGERSTOWN	MD					Other		No Assigned PAE
<input type="checkbox"/>	ALICE ANNE TOWNHOUSES	BEL AIR	MD					Other		No Assigned PAE
<input type="checkbox"/>	AMITY RAMBLE APARTMENTS	BALTIMORE	MD					Other		No Assigned PAE
<input type="checkbox"/>	AND-OVER GROUP HOME	FREDERICK	MD					Other		No Assigned PAE
<input type="checkbox"/>	Andrew Kim House	OLNEY	MD					Other		No Assigned PAE
<input type="checkbox"/>	APOSTOLIC TOWERS	BALTIMORE	MD					Other		No Assigned PAE
<input type="checkbox"/>	AREBUTA ARMS II	BALTIMORE	MD					Other		No Assigned PAE
<input type="checkbox"/>	Arlington Estates Cooperative Apts	BALTIMORE	MD					Other		No Assigned PAE
<input type="checkbox"/>	ARNOLD GARDENS APTS	SUITLAND	MD					Other		No Assigned PAE
<input type="checkbox"/>	TALLMAN TOWERS	NYACK	NY	NY36L000130	09/30/2006	Non-Profit	Grant	223(c)/221(d)		No Assigned PAE
<input type="checkbox"/>	Albina Plaza	PORTLAND	OR			Non-Profit	Grant	241		No Assigned PAE
<input type="checkbox"/>	SOMERVILLE HOMES	PHILADELPHIA	PA	PA36L000023	12/31/2009	Non-Profit	Grant/Loan	241/236		No Assigned PAE
<input type="checkbox"/>	BRYANT MANOR	SEATTLE	WA	WA19L000005	07/31/2007	Non-Profit	Grant/Loan	233(c)236		No Assigned PAE

Enter Your Name: (First name, last name)
Enter the Initial Assignment Date:

Before proceeding to another screen, save all changes by selecting the SUBMIT button.

[HUDweb Housing](#) | [HUDweb Help](#) | [HUDweb Search](#) | [HUDweb Home](#) | [Privacy](#)

Figure 12-7, Review/Assign Green Retrofit Assets Screen

1. Click the Add check box ☐ next to the Property ID to indicate the property is to have an assigned Entity Type, Grant/Loan Type and Section of Act (SOA).
2. Review the Entity Type Profit / Non Profit and option to change
3. Review the Grant/Loan Type and option to change it
4. Review the Section of Act and option to change it
5. Select a Preservation Office from the drop down list box
6. Assign a PAE from the Recommended PAE Name drop down list box
7. Repeat steps 1-6 for each additional property
8. After all property selections have been made, enter your first name, middle initial, and last name in the **Enter Your Name** field
Enter Your Name:
9. Click the Submit button to save the M2M Green Retrofit Assigned PAE Properties

12.6 Assign/Update Portfolio Manager

This function is not operational at this time.

12.7 Update Rehab Escrow Account Closed Date

This function is not operational at this time.

12.8 Change Preservation Office Screen

This function allows OAHP HQ users to change the assigned Preservation Office for the selected Green Retrofit properties. The search screen allows selecting properties by REMS ID, FHA Number, Property Name, State, PAE Name, or ALL Assigned Properties. The Search screen is depicted below in Figure 12- 8, Change Preservation Office Screen is depicted below in Figure 12- 9. Changing the Preservation Office of a property will generate a history record of the action.

[Home](#)
[Back](#)
[Secure Systems](#)
[Log Off](#)

Select Search Criteria for Changing Preservation Office

Select one of the following criteria:

REMS ID:

FHA #:

Or select one or more of the following options:

Property:

State:

PAE:

Or click [HERE](#) to get ALL assigned properties.

[HUDweb Housing](#) |
 [HUDweb Help](#) |
 [HUDweb Search](#) |
 [HUDweb Home](#) |
 [Privacy](#) |

Figure 12-8, Select Search Criteria for Changing Preservation Office Screen

[Home](#)
[Back](#)
[Secure Systems](#)
[Log Off](#)

Preservation Office Changes Of Assigned Properties

The following 4 out of 4 properties met your **CALIFORNIA** state search criteria.

Status	Property ID	Property Name	City	State	Entity Type	Preservation Office
CITY OF INDIANAPOLIS						
A	800000993	AARON HOUSE	ROHNERT PARK	CA	Non-Profit	Centralized Closing
CREDITVEST, INC.						
A	800001089	BEAR MOUNTAIN RESIDENCES	SAN ANDREAS	CA	Profit	Washington
ILLINOIS HOUSING DEVELOPMENT AUTHORITY						
A	800002877	1215 D STREET	SACRAMENTO	CA	Non-Profit	Washington
SIGNET PARTNERS						
A	800001599	Sunny Meadows	FREEDOM	CA	Non-Profit	San Francisco

Preservation Office Change Date:

(mm/dd/yyyy)

Before proceeding to another screen, save all changes by clicking the Save Changes button above.

Figure 12-9, Change Preservation Office Screen

To change the Preservation Office for a property, select from the drop down options,

Enter the **Change Date** (defaulted to current date), and click the **Save Changes** button.

13 GREEN RETROFIT TRACKING MODULE

The Green Retrofit Tracking module is accessed by clicking the **Green Retrofit Tracking** button on left menu of Green Retrofit Assets Allocation Menu screen. Within the Green Retrofit Tracking module, OHAP users may enter and modify critical date fields and their associated comments, and end the Green Retrofit process.

Clicking **Green Retrofit Tracking** button retrieves a search selection criteria page, similar to other search criteria screens, as shown below in Figure 13-1, Search Criteria for Critical Dates Tracking Screen.

Figure 13-1, Search Criteria for Green Retrofit Tracking Screen

Select one of the following criteria available to retrieve properties for the **Critical Dates Tracking** module:

- * Enter a REMS ID for a specify property
- * Enter a FHA Number for a specific property

Or select one or more of the following options available to retrieve properties for the **Critical Dates Tracking** module:

- * Select a **State** from the drop-down list
- * Select a **PAE** from the drop-down list
- * Select a **Deb Restructuring Specialist** from the drop-down list
- * Enter a Property's Name for a specific property
- * Select a Property's **Status** (Active or Completed)
- * Select a **Entity Type** (Profit / Non Profit)
- * Select a **Section of Act** (SOA)
- * Select a **Grant/Loan Type**
- * Click the underlined **HERE** link to retrieve all properties in the system

13.1 Assigned Green Retrofit Properties Screen

The **Assigned Green Retrofit Properties** screen (shown below as Figure 13-2, Assigned Green Retrofit Properties) will be returned once the search is performed (based on the criteria on the Select Search page).

Home Back Secure Systems Log Off								
Assigned Green Retrofit Program Properties								
The following 12 out of 12 properties met your All search criteria.								
To view/update a contract's critical dates, click its underlined Contract Number.								
Status	Property Name	Section of Act	Sec 8 Contract Number	Entity Type	Grant/Loan	Expiration Date	Property City	State
A	AAAC Housing I, Inc.	811	AK06Q971001	Non-Profit	Grant/Loan	12/04/2006	ANCHORAGE	AK
C	Andrews Apartments	811	AK06Q981001	Profit	Grant	12/31/2014	ANCHORAGE	AK
C	Aurora Commons	236	AK06Q981002	Non-Profit	Grant/Loan	02/28/2007	SOLDOTNA	AK
C	Cranbury Ridge	202	AK06S991002	Non-Profit	Grant/Loan	04/25/2007	HOUSTON	AK
A	Cuphuag House	515	AK06S971002	Profit	Grant/Loan	02/08/2007	STEBBINS	AK
C	DOUGLAS TERRACE APARTMENTS	202	AK06Q951003	Non-Profit	Grant/Loan	11/30/2006	JUNEAU	AK
A	KNOLLWOOD RETIREMENT CENTER	207(223(f))	AL09T871010	Non-Profit	Grant	06/26/2010	ROANOKE	AL
A	Access Anaheim	202	CA16T831020	Profit	Grant/Loan	10/22/2006	ANAHEIM	CA
A	BAY VISTA METHODIST HEIGHTS	223(c)(221(d))	CA33M000051	Profit	Grant/Loan	05/31/2009	SAN DIEGO	CA
A	MILWOOD APTS	221(d)	CA16M000339	Non-Profit	Grant/Loan	05/31/2007	CANOGA PARK	CA
A	BOOTH TOWERS	Other	MD06M000079	Profit	Grant/Loan	07/31/2006	CUMBERLAND	MD
A	ALPINE ALLEN ZIMMER	515	MI33R0000045	Non-Profit	Grant	06/18/2011	GAYLORD	MI
HUDweb Housing HUDweb Help HUDweb Search HUDweb Home Privacy								

Figure 13-2, Assigned Green Retrofit Properties

All of the assigned Green Retrofit properties that have a SOA, Entity Type and Grant/Loan Type option will be displayed (based on the criteria used to select property) and have a link to a **Green Retrofit Tracking** form.

13.2 Contract Number Link

The **Assigned Green Retrofit Properties** screen displays all assigned properties and pertinent information. It also contains the highlighted **contract number** Contract Number [FL29M000113](#) as a link to access the **Green Retrofit Tracking** form to enter or view the critical dates. The contract highlighted will be the first expiring contract for the property. The resulting screen is the **Green Retrofit Tracking** screen (discussed in the next section).

13.3 Green Retrofit Program Tracking Screen

After a contract link is selected, a Green Retrofit Program Tracking screen is retrieved. Figure 13-3, Green Retrofit Tracking Screen.

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Home
Back
Secure Systems
Log Off

Green Retrofit Program Tracking

HERMS Property ID: 600079767
 Primary FHA Number: 176HD013
 Contract Number: A026Q971001
 Preservation Office: Chicago
 HUD Project Manager: LORNA L BLANKENSHIP
 Region: Seattle
 Debt Restructuring Specialist: PATRICIA AMERSON
 OAHP/PAE Underwriter: PATRICIA AMERSON

Property Name: AASC Housing 1, Inc.
 PAE Name: City of Chicago Department of Housing
 Entity Type: Non-Profit
 Grant/Loan: Grant/Loan
 Section of the Act (GOA): 511

To view or update the OAHP comments log, click on the OAHP Comment Log link below:
[OAHP Comment Log](#)

Enter all dates in mm/dd/yyyy format
 Click the Save button near the bottom of this screen to save all updates/changes

Original Section 8 Expiration Date (Post MAHRA):
 Current Section 8 Expiration Date: 12/04/2006

OAHP Receives Green Retrofit Package: 05/01/2009

Complete Application: ☐ Yes ☒ No: 04/27/2009

Duplicate Application: ☐ Yes ☒ No: 04/27/2009

OAHP Returns Green Retrofit Package: ☐ Yes ☒ No: 04/27/2009

Phase: Assignment/Assignment

OAHP Sends List of Potential Assets: 04/22/2009

PAE Clears and OAHP Approves COI: 05/15/2009

PAE Accepts Assignment: 05/29/2009

PAE IFA Validation Feasibility Test Completed: ☐ Pass ☐ Fail

OAHP Approved PAE's IFA Analysis: 05/29/2009

Phase: Waiver/Route

Waiver: 12/30/2009

Waiver No. of Days: 0

OAHP Places Property On Hold: 0

Anticipated On Hold Removal Date: 0

OAHP Removes Property From On Hold: 0

Phase: Due Diligence

3rd Party Reports Ordered: 06/03/2009

Tenant Meeting: 06/22/2009

3rd Party Reports Accepted as Approvable: 06/29/2009

Title Bring Down Received: 07/02/2009

Due Diligence Completed: 08/01/2009

Phase: Underwriting

PAE Submits Green Retrofit Plan Submission to OAHP: 08/03/2009

OAHP Receives PAE's Green Retrofit Plan Submission: 08/05/2009

Date Proposed GR Plan Assigned to Underwriter: 08/05/2009

Date Underwriter Review of GR Plan Complete: 08/09/2009

QC/CA Reviewer: PATRICIA AMERSON

Exhibit A Review Approval Date: 09/01/2009

PO/RQ Loan Committee Date: 09/09/2009

Green Retrofit Plan Approved by OAHP: 09/09/2009

Phase: Commitment Stage

Green Retrofit Plan Commitment Received by OAHP: 09/20/2009

Green Retrofit Plan Commitment Reviewed by OAHP: 10/01/2009

718 Package Completed and Delivered by OAHP: 10/10/2009

718 Approved: 10/11/2009

718 Approved Grant Amount: 110,000.00

718 Approved Loan Amount: 96,000.00

Green Retrofit Plan Commitment Sent to Owner: 10/21/2009

Green Retrofit Plan Commitment Executed by Owner: 10/22/2009

Green Retrofit Plan Commitment Executed by OAHP: 10/23/2009

Expiration Date of Green Retrofit Plan Commitment: 11/22/2009

Phase: Closing

Scheduled Closing Date: 12/23/2009

PAE Counsel Ready to Close Date: 11/29/2009

Closing Date: 12/29/2009

Amount of Closed Grant: 99,000.00

Amount of Closed Loan: 96,000.00

Phase: Post Closing

Critical Documents Received by OAHP: 01/01/2010

Closing Documents Distributed by PAE: 01/02/2010

ORP Pre-Development Incentive Paid (Date): 0

ORP Pre-Development Incentive Paid (Amount): 0

Retrofit/Repair Completion Date: 0

ORP Efficiency Incentive Paid (Date): 0

ORP Efficiency Incentive Paid (Amount): 0

Job Creation Incentive Paid (Date): 0

Job Creation Incentive Paid (Amount): 0

Number of Jobs Created/Stored: 0

Expected Utility Savings per Project: 0

OAHP Comment Text: 0

PAE Comment Text: 0

End Green Retrofit Program Process
Click here if completed the Green Retrofit Program Process.

Clear

Figure 13-3, Green Retrofit Program Tracking Screen

14 GRP CLOSING MODULE

This module is designed to display, and track specific closing information from the Green Retrofit Program information in the M2M system. This module should prove essential to OAHP in collecting some of the data necessary to report total dollar savings from the Green Retrofit program.

There is a search screen when this module is selected as shown below in Figure 14-1, Select Search Criteria for GRP Closing Screen.

The screenshot shows a web application interface for selecting search criteria. At the top, there are navigation buttons: Home, Back, Secure Systems, and Log Off. The title is 'Select Search Criteria for Green Retrofit Program Closing'. Below the title is a red warning message: 'If a property is not listed on the resulting screen(s) of your search, please verify in Green Retrofit Tracking that a closing date has been entered.' The form asks the user to 'Select one of the following criteria:' and provides two input fields: 'REMS ID:' and 'FHA #:'. Below this, it says 'Or select one or more of the following options:' and lists several criteria with dropdown menus: 'Preservation Office:', 'State:', 'PAE:', 'Property:', 'Entity Type:', 'Section of the Act (SOA):', 'Grant/Loan:', and 'Closing Date:'. At the bottom of the form are 'Continue' and 'Clear' buttons. A link 'HERE' is provided to get all closings. The footer contains a navigation bar with links: HUDweb Housing | HUDweb Help | HUDweb Search | HUDweb Home | Privacy |.

Figure 14-1, Select Search Criteria for GRP Closing Screen

Select one of the following criteria available to retrieve properties for the Closing properties:

- ◆ Enter a REMS ID for a specify property
- ◆ Enter a FHA Number for a specific property

Or select one or more of the following options available to retrieve the Closing properties:

- ◆ Select an **Preservation Office** from the drop-down list
- ◆ Select a **State** from the drop-down list

- ◆ Select a **PAE Name** from the drop-down list
- ◆ Enter a **Property's Name**
- ◆ Select a **Entity Type** (Profit / Non Profit)
- ◆ Select a **Section of Act** (SOA)
- ◆ Select a **Grant/Loan Type**
- ◆ Select a **Closing Date** from the drop-down list
- ◆ Click the underlined [HERE](#) link to retrieve all closing properties in the system

The optional selections of **Closing Date Month** and **Closing Date Year** may be selected by themselves or in combination with the other selections. Figure 13-2, GRP Closed Properties Screen, show the results of the search screen. Properties will only appear if their plan has been approved and a closing date has been entered. Clicking an underlined contract number link will take the user directly to the Green Retrofit Program Closing screen for that property as shown below in Figure 14-2, Green Retrofit Program Closed properties Screen.

Home Back Secure Systems Log Off											
Green Retrofit Program Closed Properties											
The following 4 out of 4 properties met your All search criteria.											
To view/update a contract's closing information, click its underlined Contract Number.											
PAE Name	Status	Property Name	Section of Act	Model Uploaded	Sec 8 Contract Number	Entity Type	Grant/Loan	Closing Date	Expiration Date	Property City	State
City of Chicago Department of Housing	A	AASC Housing I, Inc.	811	<input type="radio"/>	AK060971001	Non-Profit	Grant/Loan	12/29/2009	12/04/2006	ANCHORAGE	AK
Illinois Housing Development Authority	C	Aurora Commons	236	<input type="radio"/>	AK060981002	Non-Profit	Grant/Loan	08/03/2009	02/28/2007	SOLDOTNA	AK
Heskin Signet Partnership	C	Cranberry Ridge	202	<input type="radio"/>	AK060991002	Non-Profit	Grant/Loan	09/03/2009	04/25/2007	HOUSTON	AK
Heskin Signet Partnership	A	Cuphaus House	515	<input checked="" type="radio"/>	AK060971002	Profit	Grant/Loan	08/25/2009	02/08/2007	STEBBINS	AK
HUDweb Housing HUDweb Help HUDweb Search HUDweb Home Privacy											

Figure 14-2, GRP Closed Properties Screen

14.1 Green Retrofit Program Closing Screen

The following sections provide information on the data required to complete the Closing Terms. The user must upload and populate the terms with data extracted from the Excel Underwriting Model. Figure 14-3, Green Retrofit Program Closing Screen, provides an example of the Green Retrofit Program Closing main screen with subdivisions for the model functions and the online Closing screen.

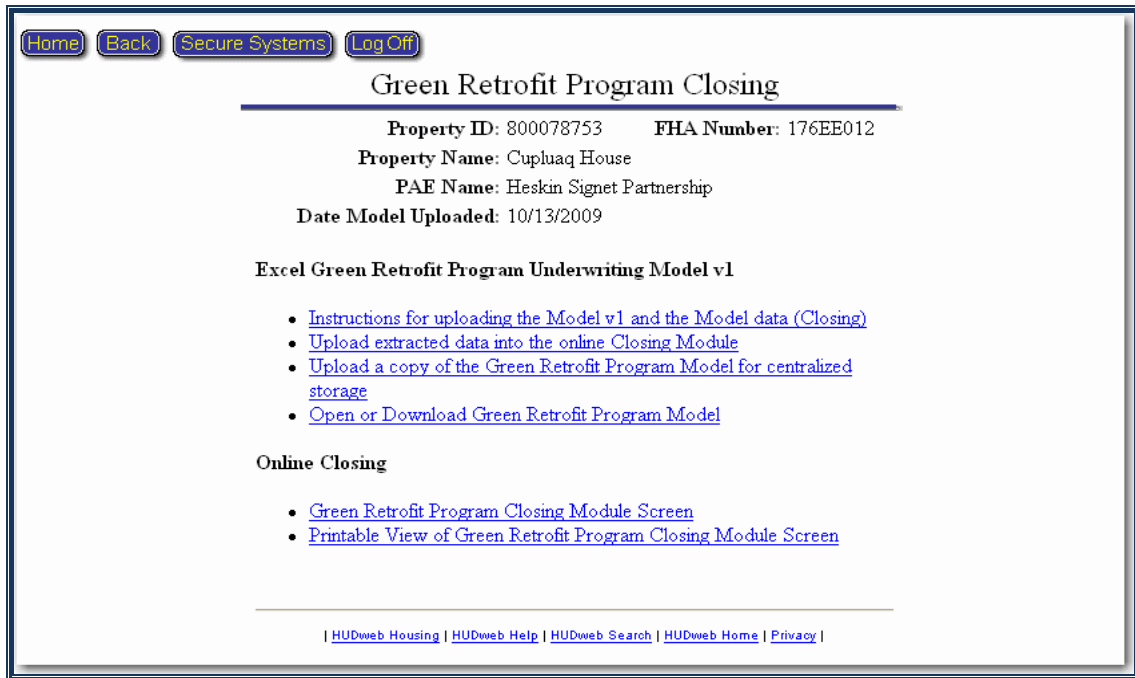


Figure 14-3, Green Retrofit Program Closing Screen

14.1.1 Excel Green Retrofit Program Underwriting Model v1

The following subsections provide detailed instructions showing how to upload the Extract data and Model to the Green Retrofit Program:

- ◆ [Instructions for uploading the Model v1 and the Model data \(Closing\)](#)
- ◆ [Upload extracted data into the online Closing Module](#)
- ◆ [Upload a copy of the Model for centralized storage](#)

14.1.1.1 Instructions for uploading the Model v1 and the Model data (Closing)

The [Instructions for uploading the Model v1 and the Model data \(Closing\)](#) (shown on the next page as Figure, 14-4, How to Upload Extract and Model screen) contains general and detailed information of the process to upload extracted data and model to the Green Retrofit Program for closing:

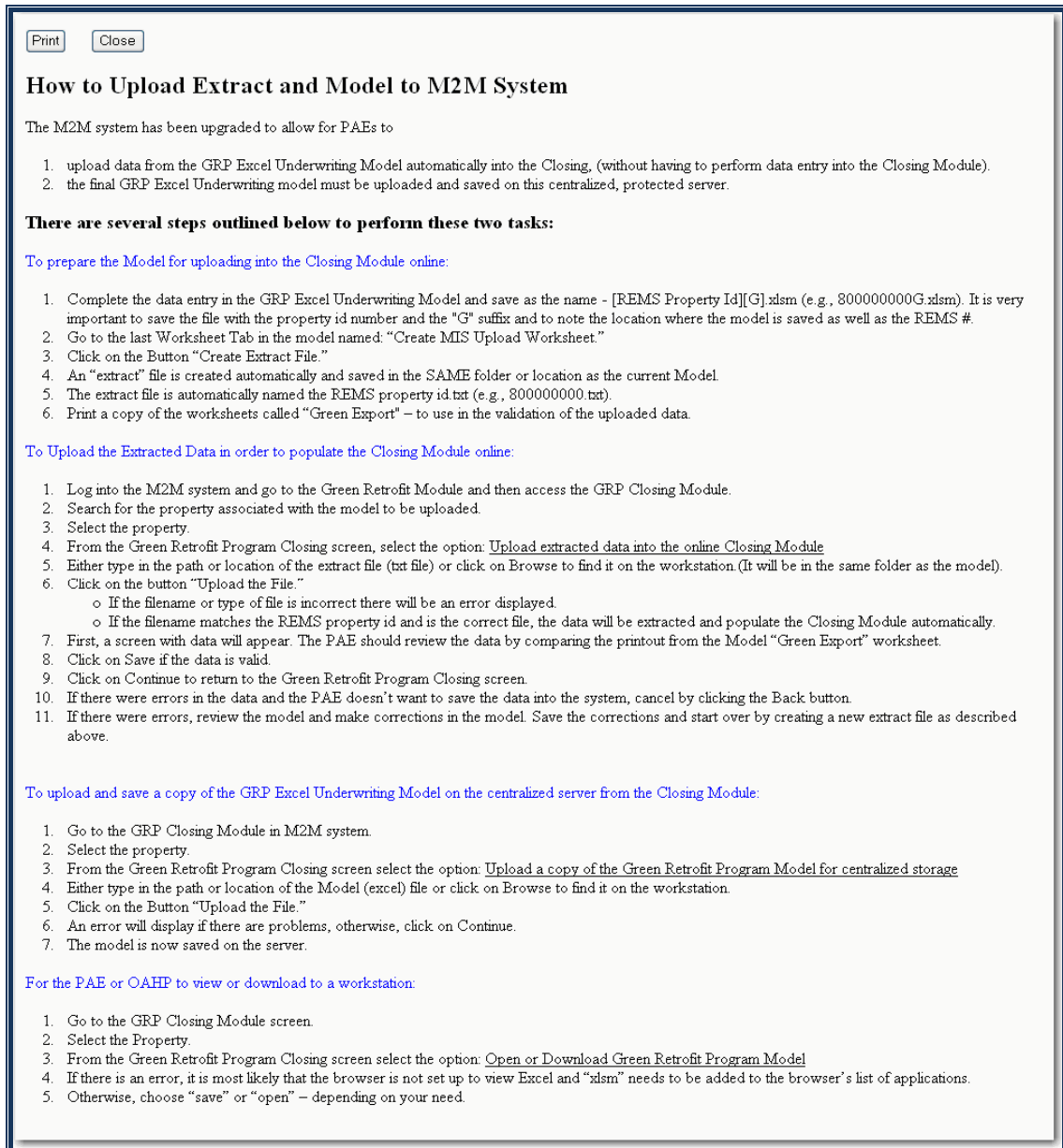


Figure 14-4, How to Upload Extract and Model Screen

14.1.1.2 Upload extracted data into the online Closing Module

The Upload extracted data into the online GRP Closing Module (shown as Figure, 14-5, Upload GRP (Closing) Screen) contains general and detailed information on how to upload extracted data into the online GRP Closing Module:

[Home](#) [Back](#) [Secure Systems](#) [Log Off](#)

Green Retrofit Program Properties Upload (Closing)

Property ID: 800078753

FHA Number: 176EE012

Property Name: Cupluaq House

PAE Name: Heskin Signet Partnership

Note: This process is to upload the GREEN RETROFIT PROGRAM CLOSING TERMS that were extracted from the Green Retrofit Program model into the text file that was created by clicking the 'Create extract file' button on the 'Create MIS upload worksheet' in the Green Retrofit Program Excel model.

The filename of the data extract to be uploaded must match the REMS property id and have a .txt extension. Performing this upload will overwrite any Closing Terms data for this property that has previously been saved.

Enter the path and name of the data extract file in the space below or click the browse button to locate the file on your workstation.

File to Upload: C:\M2MM2M_DOC\M2M_6.7\800078753.txt

Browse...

Upload the File

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Figure 14-5, Green Retrofit Program Properties Upload (Closing) Screen

Click the Upload the File button to open the Green Retrofit Program Properties Upload (Closing) Screen (shown as Figure, 14-6, Green Retrofit Program Properties Upload (Closing) Screen):

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Figure 14-6, GRP Properties Upload (Closing) Screen

Click the Save button in the bottom of the Green Retrofit Program Properties Upload Closing screen to save data into M2M database and open the Information Saved Screen (shown as Figure, 14-7, GRP Properties Upload (Closing) Information Saved Screen).

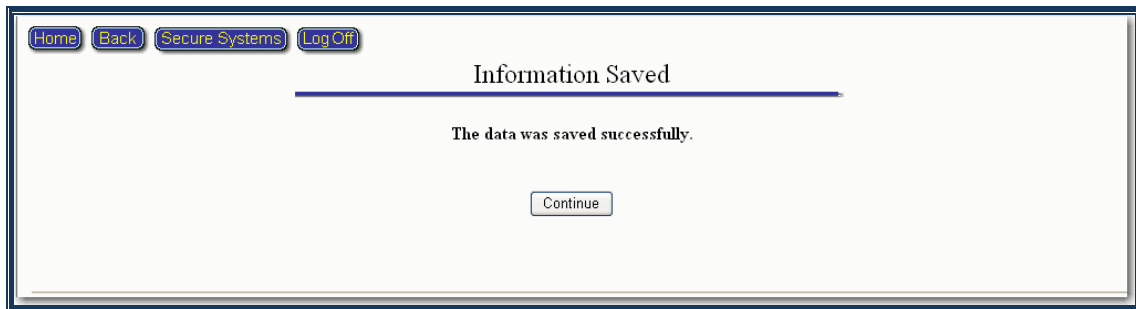


Figure 14.7, GRP Properties Upload (Closing) Information Saved Screen

14.1.1.3 Upload a copy of the Model for centralized storage

The **Upload a copy of the Model for centralized storage** (shown as Figure, 14-8, Excel Underwriting Model Upload Screen) contains general and detailed information on how to upload the Excel underwriting model:

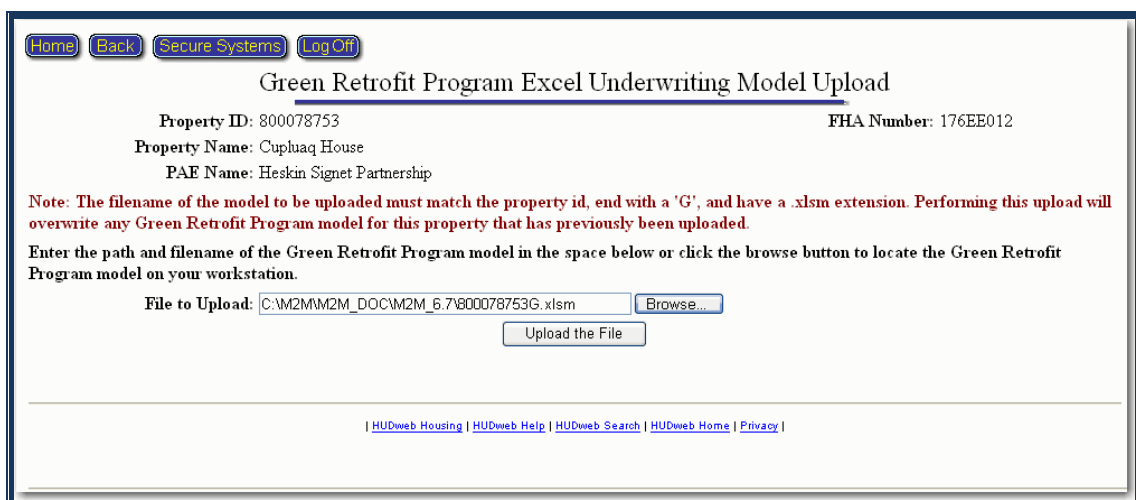


Figure 14-8, Excel Underwriting Model Screen

Perform Upload Model by clicking the Upload the File button in the bottom of the Green Retrofit Program Excel Underwriting Model Upload screen to save the model and open the Green Retrofit Program Excel Underwriting Model Upload Screen (shown as Figure, 14-9, GRP Excel Underwriting Model Upload was Successful Information Screen), Then Click the Continue button in the screen to return into Green Retrofit Program Closing Menu List Screen.

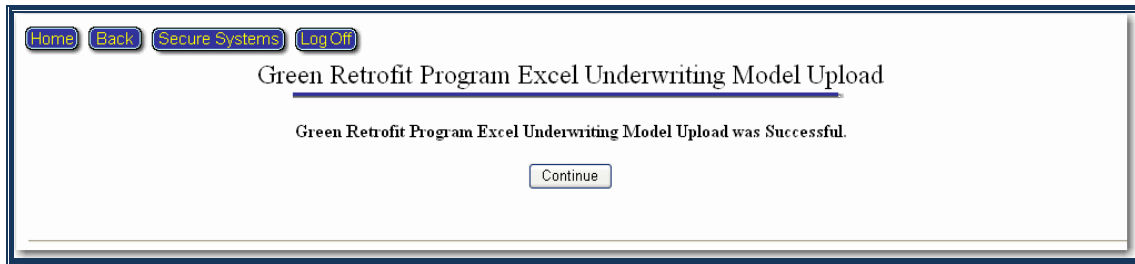


Figure 14-9, GRP Excel Underwriting Model Upload Information Screen

14.1.1.4 Open or Download Model

The **Open or Download Model** function allows users to view or download the GRP Excel Model that has been placed on the centralized server.

14.1.2 Online Closing

The following subsections provide additional information on the data that is required to populate Green Retrofit Program Closing terms:

- * Green Retrofit Program Closing Module Screen
- * Printable View of Green Retrofit Program Closing Module Screen

14.1.2.1 Green Retrofit Program Closing Module Screen

The Closing Module screen for the selected property, as shown below in Figure 14-10, Closing Module Screen, contains the following sections:

- * General Information
- * Current Unit Summary
- * First Mortgage Loan
- * Other Amortizing Loan
- * Subsidy Contract
- * Utility
- * Sources & Uses
- * Rehab Escrow Needs

After reviewing the information, OAHP users may confirm the closing by entering their name and date in the locations at the bottom of the screen and clicking the **Submit** button on the left menu.

Mark-to-Market (M2M) Release 7.2 Online System OAHF Users Guide

Closing Module Screen
For Green Retrofit Program Properties

General Information

Property ID: 00000007
Property Name:
Property Address:
Property City:
Property State:
FHA Number:
Contract Number:
REID Number:

FAR Name:
Legal Name of Owner/Entity:
Owner's Street Address:
Owner City:
Owner State:
Owner Entry Type:
Owner Contact:
Owner Contact Phone Number:
Owner Contact Email:
Type of Agent:
Year Construction:
Year Rehab/Original:
Loan Service:
Loan Officer:
State Abbrev:
Closing Date:
Property Type:

Current Year Summary

Bedroom Type	Total Units	Activated	Non-Activated	Revenue	Non Revenue
1	0	0	0	0	0
2	0	0	0	0	0
3	0	0	0	0	0
4	0	0	0	0	0
5	0	0	0	0	0
6	0	0	0	0	0
7	0	0	0	0	0
8	0	0	0	0	0
9	0	0	0	0	0
10	0	0	0	0	0
11	0	0	0	0	0
12	0	0	0	0	0
13	0	0	0	0	0
14	0	0	0	0	0
15	0	0	0	0	0
16	0	0	0	0	0
17	0	0	0	0	0
18	0	0	0	0	0
19	0	0	0	0	0
20	0	0	0	0	0
21	0	0	0	0	0
22	0	0	0	0	0
23	0	0	0	0	0
24	0	0	0	0	0
25	0	0	0	0	0
26	0	0	0	0	0
27	0	0	0	0	0
28	0	0	0	0	0
29	0	0	0	0	0
30	0	0	0	0	0
31	0	0	0	0	0
32	0	0	0	0	0
33	0	0	0	0	0
34	0	0	0	0	0
35	0	0	0	0	0
36	0	0	0	0	0
37	0	0	0	0	0
38	0	0	0	0	0
39	0	0	0	0	0
40	0	0	0	0	0
41	0	0	0	0	0
42	0	0	0	0	0
43	0	0	0	0	0
44	0	0	0	0	0
45	0	0	0	0	0
46	0	0	0	0	0
47	0	0	0	0	0
48	0	0	0	0	0
49	0	0	0	0	0
50	0	0	0	0	0
51	0	0	0	0	0
52	0	0	0	0	0
53	0	0	0	0	0
54	0	0	0	0	0
55	0	0	0	0	0
56	0	0	0	0	0
57	0	0	0	0	0
58	0	0	0	0	0
59	0	0	0	0	0
60	0	0	0	0	0
61	0	0	0	0	0
62	0	0	0	0	0
63	0	0	0	0	0
64	0	0	0	0	0
65	0	0	0	0	0
66	0	0	0	0	0
67	0	0	0	0	0
68	0	0	0	0	0
69	0	0	0	0	0
70	0	0	0	0	0
71	0	0	0	0	0
72	0	0	0	0	0
73	0	0	0	0	0
74	0	0	0	0	0
75	0	0	0	0	0
76	0	0	0	0	0
77	0	0	0	0	0
78	0	0	0	0	0
79	0	0	0	0	0
80	0	0	0	0	0
81	0	0	0	0	0
82	0	0	0	0	0
83	0	0	0	0	0
84	0	0	0	0	0
85	0	0	0	0	0
86	0	0	0	0	0
87	0	0	0	0	0
88	0	0	0	0	0
89	0	0	0	0	0
90	0	0	0	0	0
91	0	0	0	0	0
92	0	0	0	0	0
93	0	0	0	0	0
94	0	0	0	0	0
95	0	0	0	0	0
96	0	0	0	0	0
97	0	0	0	0	0
98	0	0	0	0	0
99	0	0	0	0	0
100	0	0	0	0	0

Figure 13-10, GRP Closing Module Screen

Figure 14-11, Printable View of GRP Closing Module Screen

15 GRP REPORTS MODULE

The GRP **Reports** module is accessed by selecting the **Reports** button from GRP's home screen. The reports within the module are a summarization of the data entered in the **Critical Dates Tracking** screens and are also management tracking tools to view the overall status of where the assigned properties are in the GRP process. In addition, there are internal management level reports to assist OAHP and its business partners in the management of its Green Retrofit Program assets.

Generally, only **active** properties in the Green Retrofit Program that are assigned to and accepted by a PAE appear in GRP's Reports, though some reports include **completed** properties and allow the User to choose what to be selected. In addition, there are specific criteria for each report, e.g., for the GRP **Property Status Report**, only properties that have at least **one critical date** entered into the system are included on the report. The **Property and Report Selection** page is shown below as Figure 15-1, Property and Report Selection Screen:

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GRP Property and Reports Selection

Report Information

Click On Report Title Below:	And View Its Description Here:
Management Reports	
Green Retrofit Assigned Active Properties Report	The Green Retrofit Assigned Active Properties Report is a list of all of the current Green Retrofit properties, the assigned PAE, and the Green Retrofit phase in which each property resides.
Progress Reports	
Green Retrofit Progress Report I	
Green Retrofit Progress Report II	
Green Retrofit Focus on Production Report	

Click Here ☐ To View Printable Version Only ¹

Click Here ☒ To View Screen Version

Click Here ☐ To Download Electronic Version Only ²

Click On SELECT SEARCH OPTIONS Button To Continue:

SELECT SEARCH OPTIONS

Click On Clear Selections Button To Restore Default Settings:

Clear Selections

¹ To print a selected report:

1. Select the **View Printable Version** Button above.
2. Click '**Select Search Options**' Button.
3. Select search options and click '**Continue**' Button.
4. Select **Print** on the File menu.
5. Click on **Properties**.
6. Select **Letter** or **Legal*** on the Paper Size option.
7. Select **Portrait** or **Landscape*** on the Orientation option.
8. Click **OK**.

² To download a selected report:

1. Select the **Download Electronic Version** Button above.
2. Click '**Select Search Options**' Button.
3. Select search options and click '**Continue**' Button.
4. Click the '**Save**' button when it appears, name the file any name and save as type Microsoft Office Excel Comma Separated Value File.

Open Microsoft Excel (or other application of choice) and open the saved file. The file may now be resaved in the format of Excel or

Figure 15-1, GRP Property and Report Selection Screen

15.1 GRP Property and Report Selection

The GRP **Reports** module allows users to generate the following reports:

- ◆ Green Retrofit Assigned Active Properties Report
- ◆ Green Retrofit Progress Report I
- ◆ Green Retrofit Progress Report II
- ◆ Green Retrofit Focus on Production Report

To view a report, click the report title in the scroll down selection box and click one of the viewing options. Reports may be viewed on-screen, printed, or downloaded and saved in an electronic format. Next, click the Select Search Options button and make your selections in the opened window.

To save a downloadable version of a report:

7. Select the Download Electronic Version radio button
8. Click the 'Select Search Options' button
9. Select search options and click the 'Continue' button
10. Click the "Save File..." button and name the file a name with a ".csv" extension (e.g., "testrept.csv").
11. Open application of choice (e.g., Microsoft Excel) and the saved file.
12. The file may be resaved in the format of the application.

15.2 Green Retrofit Assigned Active Properties Report

The Green Retrofit **Assigned Active Properties Report** (Figure 15-2, Green Retrofit Assigned Active Properties Report on the next page) contains a listing of all of the current Green Retrofit Program properties, the PAE to which each property is assigned, and the Green Retrofit Program phase in which each property resides.

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Green Retrofit Assigned Active Properties Report

Today's Date: 10/13/2009

Preservation Office: Chicago									
PAE Name	Property Name	Entity Type	Grant/Loan Type	Section of Act	Last Critical date	Date	Property ID	Property City	Property State
City of Chicago Department of Housing	AASC Housing I, Inc.	Non-Profit	Grant/Loan	811	Closing Date	12/29/2009	800078767	ANCHORAGE	AK
CreditVest, Inc.	ALPINE ALTEN ZIMMER	Non-Profit	Grant	515	OAHP Sends List of Potential Assets	07/29/2009	800009877	GAYLORD	MI

Preservation Office: San Francisco									
PAE Name	Property Name	Entity Type	Grant/Loan Type	Section of Act	Last Critical date	Date	Property ID	Property City	Property State
Heskin Signet Partnership	Cupluaq House	Profit	Grant/Loan	515	Closing Date	08/25/2009	800078753	STEBBINS	AK
Foley and Judeil, LLP	Access Anaheim	Profit	Grant/Loan	202	OAHP Sends List of Potential Assets	05/06/2009	800000996	ANAHEIM	CA
ONTRA, Inc.	BAY VISTA METHODIST HEIGHTS	Profit	Grant/Loan	223(c)/221(d)	OAHP Sends List of Potential Assets	08/05/2009	800052180	SAN DIEGO	CA
The Siegel Group, Inc.	MILWOOD APTS	Non-Profit	Grant/Loan	221(d)	OAHP Sends List of Potential Assets	04/29/2009	800001979	CANOGA PARK	CA

Preservation Office: Washington									
PAE Name	Property Name	Entity Type	Grant/Loan Type	Section of Act	Last Critical date	Date	Property ID	Property City	Property State
Jefferson County Assisted Housing Corp.	KNOLLWOOD RETIREMENT CENTER	Non-Profit	Grant	207/223(f)	OAHP Receives Green Retrofit Package	07/25/2009	800000405	ROANOKE	AL
CreditVest, Inc.	BOOTH TOWERS	Profit	Grant/Loan	Other	OAHP Sends List of Potential Assets	09/14/2009	800009125	CUMBERLAND	MD

Figure 15-2, Green Retrofit Assigned Active Properties Report

15.3 Green Retrofit Progress Report

The **Green Retrofit Progress Report** details the progress and status of the active GRP properties currently assigned to PAEs. It details the referral and acceptance dates, the dates the PAE executes M2M Program tasks, the dates the Green Retrofit Program was submitted to OAHP and the date OAHP issues a decision on submitted plans. An example of this report is presented as Figure 15-3, Green Retrofit Progress Report (Part I) and Figure 15-4, Green Retrofit Progress Report (Part II).

 **Note:** It is necessary to load legal-sized paper and set your printer to print in landscape mode for this progress report.

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Green Retrofit Progress Report I

Today's Date: 03/24/2010

	State	Status	Primary FHA Number	Entity Type	Grant/Loan	Property ID	SOA	OAHP Receives GRP	Complete Application	Duplicate Application	OAHP Returns GRP	OAHP Sends List of Potential Assets	PAE Clears and OAHP Approves COI	PAE Accepts Assign.	PAE IFA Validation Feasibility Test Completed	OAHP Approved PAE's IFA Analysis	Waiver	OAHP Place Prope On Hold
Preservation Office: Chicago																		
City of Chicago Department of Housing																		
AASC Housing I, Inc.	AK	Active	176HD013	Non-Profit	Grant/Loan	800078767	811	05/01/2009	04/27/2009	04/27/2009	04/27/2009	04/22/2009	05/15/2009	05/29/2009			12/30/2009	
PAE Total								1	1	1	1	1	1	1	0	0	1	0
CreditVest, Inc.																		
ALPINE ALTEN ZIMMER	MI	Active		Non-Profit	Grant	800098877	515	01/01/2010	01/02/2010	01/03/2010	01/04/2010	07/29/2009	02/01/2010	02/02/2010	02/03/2010	02/04/2010	03/01/2010	03/02/2010
PAE Total								1	1	1	1	1	1	1	1	1	1	1
Illinois Housing Development Authority																		
Aurora Commons	AK	Completed	176HD016	Non-Profit	Grant/Loan	800112382	236	04/01/2009	04/02/2009	04/03/2009	04/04/2009	04/23/2009	04/24/2009	04/25/2009	04/26/2009		08/04/2009	
PAE Total								1	1	1	1	1	1	1	1	0	1	0
Preservation Office Total								3	3	3	3	3	3	3	2	1	3	1

Date: 03/24/2010

Waiver	OAHP Places Property On Hold	Anticipated On Hold Removal Date	OAHP Removes Property from On Hold	3rd Party Reports Ordered	Tenant Meeting	3rd Party Reports Accepted as Approvable	Title Bring- Down Received	Due Diligence Completed	PAE Submits GRP Submission to OAHP	OAHP Receives PAE's GRP Submission	Date Proposed GRP Assigned to Underwriter	Date Underwriter Review of GRP Complete	Exhibit A Review Approval Date	PO/HQ Loan Committee Date	GRP Approved by OAHP	
12/30/2009					06/03/2009	06/22/2009	06/29/2009	07/02/2009	08/01/2009	08/03/2009	08/05/2009	08/05/2009	08/09/2009		09/01/2009	09/09/2009
1	0	0	0	1	1	1	1	1	1	1	1	1	0	1	1	
03/01/2010	03/02/2010	03/03/2010	03/04/2010	04/01/2010	04/02/2010	04/03/2010	04/04/2010	04/05/2010	05/01/2010	05/02/2010	05/03/2010	05/04/2010	05/05/2010	05/06/2010	05/07/2010	
1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	
08/04/2009					05/01/2009	05/02/2009	05/03/2009	05/04/2009	05/05/2009	06/01/2009	06/02/2009	06/13/2009	06/14/2009		06/15/2009	06/16/2009
1	0	0	0	1	1	1	1	1	1	1	1	1	0	1	1	
3	1	1	1	3	3	3	3	3	3	3	3	3	1	3	3	

Figure 15-3, Green Retrofit Progress Report (Part I)

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Green Retrofit Progress Report II

Today's Date: 03/24/2010

	State	Status	Primary FHA Number	Entity Type	Grant/Loan	Property ID	SOA	GRP Commitment Received by OAHP	GRP Commitment Reviewed by OAHP	718- Package Completed and Delivered by OAHP	718 Approved	GRP Commitment Sent to Owner	GRP Commitment Executed by Owner	GRP Commitment Executed by OAHP	Expiration Date of GRP Commitment	Sche Clos Da
Preservation Office: Chicago																
City of Chicago Department of Housing																
AASC Housing I, Inc.	AK	Active	176HD013	Non- Profit	Grant/Loan	800078767	811	09/20/2009	10/01/2009	10/10/2009	10/11/2009	10/21/2009	10/22/2009	10/23/2009	11/22/2009	12/23/2009
PAE Total								1	1	1	1	1	1	1	1	1
CreditVest, Inc.																
ALPINE ALTEN TIMMER	MI	Active		Non- Profit	Grant	800009877	515	06/01/2010	06/02/2010	06/03/2010	06/04/2010	06/05/2010	06/06/2010	06/07/2010	07/07/2010	07/01/2010
PAE Total								1	1	1	1	1	1	1	1	1
Illinois Housing Development Authority																
Aurora Commons	AK	Completed	176HD016	Non- Profit	Grant/Loan	800112382	236	07/11/2009	07/12/2009	07/03/2009	07/04/2009	07/15/2009	07/16/2009	07/17/2009		08/01/2009
PAE Total								1	1	1	1	1	1	1	0	1
Preservation Office Total								3	3	3	3	3	3	3	2	3

Today's Date: 03/24/2010

GRP Commitment Executed by OAHP	Expiration Date of GRP Commitment	Scheduled Closing Date	PAE Counsel Ready to Close Date	Closing Date	Critical Documents Received by OAHP	Closing Documents Distributed by PAE	GRP Pre- Development Incentive Paid Date	Retrofit/Repair Completion Date	GRP Efficiency Incentive Paid Date	Job Creation Incentive Paid Date
10/23/2009	11/22/2009	12/23/2009	11/29/2009	12/29/2009	01/01/2010	01/02/2010				
1	1	1	1	1	1	1	0	0	0	0
06/07/2010	07/07/2010	07/01/2010	07/02/2010	07/03/2010	08/01/2010	08/02/2010	08/03/2010	08/04/2010	08/05/2010	08/06/2010
1	1	1	1	1	1	1	1	1	1	1
07/17/2009		08/01/2009	08/02/2009	08/03/2009						
1	0	1	1	1	0	0	0	0	0	0
3	2	3	3	3	2	2	1	1	1	1

Figure 15-4, Green Retrofit Progress Report (Part II)

15.4 Green Retrofit Focus on Production Report

The **Focus on Production Report** (Figure 15-5, Green Retrofit Focus on Production Report) provides a roll up of the total number by SOA, Profit, Non-Profit, Grant, Grant/Loan for each Preservation Office.

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Green Retrofit Focus on Production Report

As of 10/13/2009

Preservation Office	Total Received	202	207/223 (0)	220	221 (0)	221(0)(0) BMDR	221(0)(0) MKT	223(a) (7)	223 (0/221)(0)	223 (0)	231	233(0) 236	236	241	241/221	241/223	241/236	515	524 (0)	511	Mod Rehab	Other Profit	Non-Profit	Grant	Grant/Loan	
Chicago	3	0	0	0	0	0	0	0	0	0	0	0	1	0	0	0	0	1	0	1	0	0	0	3	1	2
New York	2	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	0	1	1	0	2
San Francisco	6	1	0	0	1	0	0	0	1	0	0	1	0	0	0	0	0	1	0	1	0	0	4	2	2	4
Washington	3	1	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1	2	1	2	
Total	14	3	1	0	1	0	0	0	1	0	0	1	1	0	0	0	0	2	0	2	1	1	6	8	4	10

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Figure 15-5, Green Retrofit Focus on Production Report